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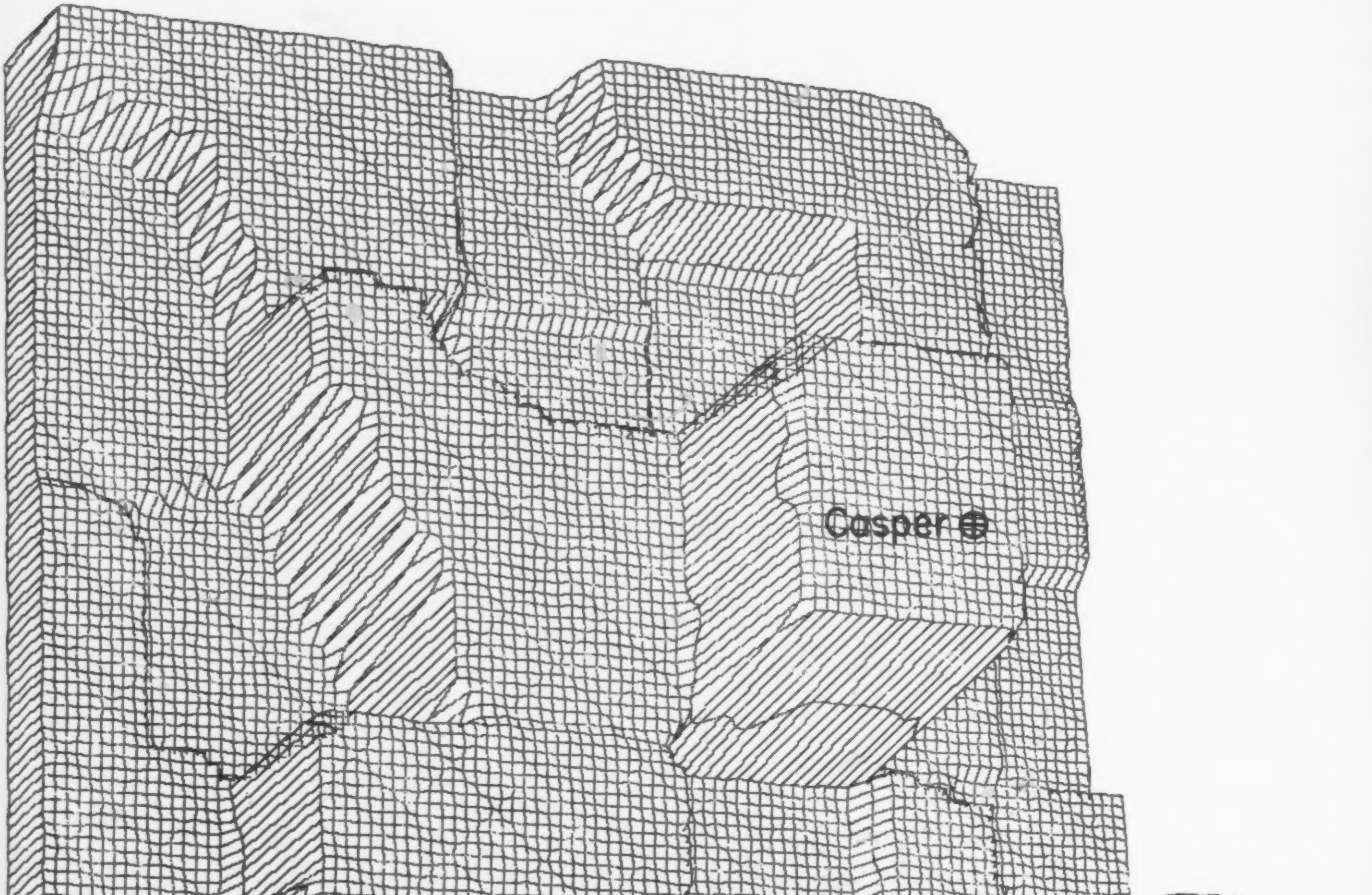
Wyoming Quarterly Update


Casper
Cheyenne

1980 County Populations

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Wyoming Quarterly Update

Wyoming Quarterly Update (WQU) represents the efforts of the Institute for Polity Research (IPR) at the University of Wyoming to provide improved data access services. Over 96 data series in eleven major subject areas are presented in the first edition of WQU. The data presented in WQU are assembled from secondary sources, such as government agencies and private industry. The staff of IPR greatly appreciates the ongoing cheerful co-operation of each of the data sources listed in the bibliography.

The WQU effort was undertaken for two primary reasons. The first was a desire to continue and substantially expand upon the popular economic indicators, formerly published in Wyoming Issues magazine. The second was to meet the need throughout Wyoming for timely, easily accessible data. Most of the data published in WQU are updated quarterly with the most current numbers. The complete data sets from which WQU originates are maintained, together with documentation, in machine-readable form by IPR. Many data series, such as gasoline sales and taxation data span more than 30 years. Numerous other series cover 20 years or more.

Efforts to expand the subject and geographic detail (county level data) of data sets will be made continuously. In future editions, the reader can look forward to more use of graphs and maps for visual interpretation of data.

The cover page of each edition will feature a contour map which illustrates the geographic distribution of a particular variable. This edition features a contour map of the population of each county in 1980.

For additional information, to make suggestions, or to request data, contact WQU project manager John Merrifield at:

The Institute for Policy Research
University Station, Box 3925
Laramie, WY 82071
(307) 766-5141

Institute for Policy Research
College of Commerce and Industry
and College of Arts and Sciences
University of Wyoming

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Project Manager..John D. Merrifield
Project Programmer..Bob Senser
Editorial Advisors..Shelby Gerking
G. Fred Doll
Editorial Assistant......................................Lorri Fuhs Pedersen
Research Aides..R. Bruce Waldo
Julie Gizinski
Bruce Dougan
Paulette Barclay
Graphics..University of Wyoming
Graphic Arts Service

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The articles appearing in this publication represent the opinions of the authors and do not necessarily reflect the views of the State of Wyoming or the University of Wyoming or their respective executive officers.

Format

For data available at least quarterly, the last 12 quarters is printed in WQU. In this edition, published series begin with the 3rd quarter of 1978, and end with the 2nd quarter of 1981. For other data series (primarily annual), the most recent observations, up to 12, are published in WQU. Most annual data series will reappear in WQU only when updated, or about every fourth issue. Quarters are calendar quarters. For example, the 3rd quarter is composed of July, August, and September. For table headings and in the narratives, a particular quarter will be indicated by notation such as 2/80 (2nd quarter, 1980), 1/79 (1st quarter, 1979), and so on.

Beside each data series name is a two-digit number in parentheses. The number is a data value units (such as dollars, tons, feet, miles, etc.) code. The key to the units code follows the last data page. Following the units code page is a bibliography of data sources, listed by WQU page number of the data.

Throughout WQU, all data are for the state unless otherwise stated. The most recent year's data should be viewed as preliminary due to revisions. The acronymn I.N.A. signifies that information is not available. Some graphics are used to illustrate trends. When more than one trend line appears on a graph, the line will be labeled with a number which matches the number of a data series on the accompanying table.

THE WYOMING SCENE

Synopsis and Future Outlook

by John Merrifield

High interest rates dominate the economic outlook, especially on the national level. Preliminary data reported by the U.S. Department of Commerce in Survey of Current Business (June 1981, pg. 1) indicate that real Gross National Product growth, averaging 6% over the fourth quarter of 1980 and first quarter 1981, has given way to no real growth in the second quarter, 1981. Business Week (August 31, 1981, pg. 75) reports that investors expect the economy to slip further in the immediate future. The current slump (as of early September) in the stock market is widely interpreted (U.S. News and World Report [USNWR], September 14, 1981, pg. 81) as a lack of investor confidence in the Reagan economic program, due to take effect in October. USNWR (September 7, 1981, pg. 18) reports that the impacts of high interest rates -- a prime rate of 20.5% -- are likely to overshadow the stimulative effect of the Reagan economic recovery plan. The July inflation rate of 15.2% and the recent increase in the national unemployment rate from 7.0 to 7.2 percent (USNWR, September 14, 1981, pg. 20) are also symptomatic of economic problems.

Although the impact of a weak national economy and high interest rates are evident in the value of authorized construction (Table 7), savings and loan mortgage loans (Table 6), and somewhat in new car registrations (Table 9), the Wyoming outlook is brighter than that for the nation.

Wyoming coal, oil, and natural gas output are up from the same period last year (Table 1), and the future looks promising also. According to officials at Northern Gas Company, the Public Service Commission, and the State Geological Survey (interviews, September 8-9, 1981) recent radio and television news reports allege that the Reagan administration is contemplating on accelerated decontrol schedule for natural gas. Such a move would be followed by substantial price increases. Continuing instability in the Mideast, and plans by the Saudis to cut production by a million barrels per day (USNWR, August 31, 1981, pg. 63), could eventually erase the current so-called oil glut, and spur domestic production. That is not good news for consumers, but would significantly boost state government revenues through royalty payments and the severance tax, and increase producers' revenues. Continuing government efforts to increase coal use and exports (USNWR, June 29, 1981, pg. 60, and May 25, 1981, pg. 49), and to ease environmental standards affecting coal producers, should prompt continued growth of Wyoming coal output.

According to the minerals division of the Wyoming Department of Economic Planning and Development (DEPAD 1980 Mineral Yearbook), the outlook is also good for continued growth in the trona and bentonite mining industries. Bentonite is important for oil drilling operations, and exploratory drilling is expected to increase substantially. Wyoming's trona deposits are by far the largest source of natural soda ash in the nation. Aging plants and environmental problems are cited by DEPAD as reasons why more and more synthetic soda ash production will be replaced by growth of the Wyoming trona industry. The uranium industry outlook is an exception to the otherwise bright future of mining in Wyoming, at least for a while. Fiscal year 1980 taxable production was down 10% (1980 DEPAD Mineral Yearbook) from 1979 output. Layoffs during the past year indicate that a further decline will be reported when fiscal year 1981 figures are reported in a few months. Even if the Reagan administration's nuclear industry legislation is enacted, recovery is uncertain, and at best will be very gradual. Three Mile Island clean-up costs, costly construction delays and possible cancellations in the Pacific Northwest (Los Angeles Times, August 30, 1981, pg. 1), and vocal, often violent, opposition to the final licensing of the Diablo Canyon, California Nuclear Plants (Wall Street Journal, August 24, 1981, pg. 1) are examples of problems not likely to be quickly forgotten by utility officials.

Second quarter, 1981 figures indicate a marked increase in tourism (Table 2) over 2/80. The only exception is the Wyoming half of the Big Horn Canyon National Recreation Area. A survey of Jackson business people performed for an IPR research project indicates that Wyoming may be experiencing record tourist traffic. That will probably be confirmed when 3/81 data are published in the next edition of WQU. While some Jackson merchants described business as "the best ever," others indicated that the weak national economy was evident from the smaller purchases made by each tourist. The outlook for tourism in 1982 is uncertain. Much depends on continued stability of fuel supplies, and on the impact of the president's economic recovery program. The winter tourist season additionally depends on good snowfall.

The agricultural outlook brightened substantially when unusually heavy spring and summer rains followed the very dry winter. The second quarter price indices (see Table 2) show that Wyoming farmers and ranchers fared better in the last three months than their U.S. counterparts.

The overall growth of the state's economy, in addition to what appears to be guaranteed by the state's mining industry, is dependent on the president's economic recovery program. The long term results of the budget cuts, tax cuts, regulatory reform, and increased military spending are at best uncertain. The ranks of the program's doubters and detractors includes two formers chairmen of the Council of Economic Advisers, Walter Heller (Wall Street Journal, February 10, 1981) and Charles Schultze (CBS' Face the Nation, August 30, 1981), and Nobel prize-winning economist Wassily Leontief (USNWR, March 16, 1981, pg. 26). A supporter, Senate Majority Leader Howard Baker (R-Tennessee), describes the program as "a riverboat gamble" (National Review, August 21, 1981, pg. 936). It is generally agreed that substantially increased savings and investment must follow the tax cut if there is to be any chance that lower inflation, lower interest rates, and lower unemployment can coincide with a balanced budget and increased military spending.

Fall Agricultural Outlook

Robert D. Carver
Extension Marketing Economist

Prices paid to agricultural producers in all sectors of Wyoming's agricultural industry remained under pressure throughout the late summer months. Feeder cattle prices are 20 percent below the prices received during the fall of 1980. Feeder lamb prices are $10-$15/cut below year-ago levels, as lamb feeders remain cautious about slaughter lamb prices this coming winter. A record wheat crop and near record feed grain crop point to farm prices that will average below those received in 1980.

Livestock:

The supply of feeder cattle available this fall is about 1 percent larger than a year earlier, based on the USDA July 1 inventory of cattle. According to the mid-year inventory report, all the gain is in cattle weighing less than 500 pounds. The number of steers not on feed July 1 was about 2 percent less than a year earlier. Calves (those under 500 pounds in all classes) were about 2 percent larger than on July 1, 1980. Placements of cattle on feed during July in the 7 major feeding states were about 28 percent below a year earlier, and the 23 state report on August feedlot replacements were down 11 percent. This adds up to potential reduction in feed beef supplies this coming fall and winter.

One of the surprises of the USDA's July 1 inventory report was in producers intentions to hold heifer replacements. Beef replacement heifers saved for possible herd expansion were 7 percent above last year and point to continued herd rebuilding. Improved grazing and forage prospects are encouraging producers to continue to buildup in spite of feeder cattle selling at prices lower than a year ago. The 1981 calf crop was projected to be only 1 percent larger than last year, however unless a larger number of cows and heifers end up on the kill floor this winter, producers can expect another jump in 1982's calf crop.

Fed cattle marketings are expected to be 3-5 percent less than a year ago through the remainder of 1981. Non-grain fed steer, heifers and cow slaughter are also expected to be slightly less than a year earlier. Industry estimates indicate cattle feeders have had average losses on steer calf feeding programs of over $53 per head for the first 8 months of 1981. These figures do not lend much optimism for the feeder cattle industry this fall.

Timely rains in the Corn Belt and the Plains States improved prospects for production a large corn crop this year. The August Crop Report by USDA projected 1981 corn production for grain at 7.7 billion bushels, compared with 6.6 billion harvested last year, and the record 7.9 billion bushels in 1979. Other feed grain crops, notably sorghum and barley, are also expected to be larger this year. Total feed grain production (corn, sorghum, oats and barley) for the U.S. this year is estimated at 236 million metric tons, almost 20 percent more than the 1980 million ton crop for 1980, but 2 million metric tons less than the record crop of 1979.

With the completion of the 1981 winter wheat harvest, a record supply (3.4 billion bushels) is on hand for the 1981-82 wheat marketing year. Fortunately a very large (1.775 billion bushels) export demand is forecast. Wheat prices should exhibit some strength through the remainder of the marketing year in response to export demand. Overall, grain prices will likely fall from last years $3.96 a bushel to between $3.70 and $4.00.

The prospects for feeder cattle and lamb prices are rather pessimistic for the remainder of 1981 and all of 1982. Inflation has spiraled production costs even higher and feeder livestock are projected to bear the brunt of depressed prices in the foreseeable future. A larger than expected feed grain crop will lend some strength to feeder cattle as we move into late fall and winter, however, calf and yearling prices will only be equal to, or slightly above fed cattle prices the remainder of the year. Cow-calf operators will be facing another belt tightening year in 1982 unless something unforseeable on the horizon would turn prospects around.

FALL MINERALS OUTLOOK

INDUSTRIAL, BASE, PRECIOUS AND FISSIONABLE MINERALS

by W. Dan Hausel, Deputy Director, Geological Survey of Wyoming

I. Diamonds

Exploration and assessment of diamondiferous kimberlite in the Colorado and Wyoming region is continuing and may be spreading to other regions in the United States.

In the Colorado and Wyoming region, Cominco American Incorporated recently completed the construction of a diamond extraction test facility north of Fort Collins. The facility was constructed at a cost of about $2.5 million and will be operated for several years as it is used to test the commercial possibilities of several kimberlite intrusives in areas previously mapped by geologists of Colorado State University and the Geological Survey of Wyoming. The test facility will use a Sortex diamond sorter that is similar to diamond extracting equipment used in Africa, Australia and in the USSR. Superior Minerals (Superior Oil Company) is operating a similar facility in the Prarie Divide region about 25 miles northwest of Fort Collins according to Engineering and Mining Journal (Aug. '81).

Exploration for diamonds outside of the Colorado-Wyoming region has recently been reported in Arkansas, Kentucky, Missouri, Michigan, Wisconsin, Kansas, Arizona, Idaho, Utah and California. No major discoveries have been reported to date.

II. Uranium

The uranium market continues to be depressed with the average price per pound of yellowcake reported at $23.50. During a time of high unemployment in the uranium industry and in the wake of several mine shut-downs, two uranium mines are running at full steam. In Fremont County, plans are to begin production during mid-August of 1981 at the Bison Basin solution mine operated by Ogle Petroleum Company. About 300,000 to 400,000 pounds of yellowcake will be recovered annually by the in situ solution mine. The mining venture is considered economic because the company's uranium contracts are at a set price and are not based on the current market.

At Minerals Exploration's Sweetwater mine in Carbon County, uranium production is presently above mill capacity! The mill which is rated to handle 3000 tons of ore per day is running ore through at about 900 tons over capacity. The mine operation is considered economic with the present market because of good contracts and because of a relatively low overhead. The average ore grade at the mine is very low (about 0.038), but the efficiently operated facility is able to make an economic venture at the present low price.

III. Precious Metals

The fairly stable price of gold could be an important factor in increased exploration activity for gold and platinum in Wyoming. Presently, three small gold mining ventures are operating under small mine permits in the South Pass-Atlantic City region. Several companies are examining additional regions for gold mineralization.

Some of the more important gold-regions in the State are the geologically old volcanic regions that are termed "greenstone belts". The Geological Survey of Wyoming is initiating a program to examine such regions in the state for mineralization. Already, the Survey has discovered significant gold mineralization in one of these belts.

IV. Iron Ore

The depressed market for iron ore continues to hamper Wyoming's iron ore industry. Last Summer, the poor iron market forced the shutdown of C.F. & I.'s Sunrise mine in Platte County. The continued poor market has kept the Sunrise from reopening its shafts.

U.S. Steel Corporation recently announced the closure of its open pit operation in the Iron Springs district of southern Utah. The Utah mine was one of two main suppliers to U.S. Steel's Geneva Steel Works at Provo, Utah. The other main supplier is the Atlantic City mine in Fremont County, Wyoming. It is not known how this closure will affect the Atlantic City mine, or if it will have any effect at all.

V. Industrial Minerals

Several firms are continuing to seek high-calcium limestone for use in scrubbers for coal fired units in the Rock Springs area. At present, the closest source of high-calcium limestone appears to be in the Laramie and Cheyenne areas.

Sources of good-quality feldspar for the glass-manufacturing industry are additionally being sought by mining companies in the Laramie-Cheyenne area. No plans for mines have been made for these commodities to date.

VI. Oil and Gas

by Alan Ver Ploeg, Staff Petroleum Geologists, Wyoming Geological Survey

Final figures for 1980 indicate that, once again, Wyoming led the Rocky Mountain region in oil and gas activity. According to Petroleum Information statistics, 1371 wells were drilled in 1980, 14 less than in 1978. Total oil production was estimated at 124,676,420 barrels by the Wyoming Oil and Gas Conservation Commission, down 3.8% from 1979, but still tops in the Rocky Mountain region. Gas production was estimated at 436,040,936 MCF, up 7.9% from 1979 and second only, to New Mexico's totals for 1979.

New field wildcat discoveries were concentrated as in previous years, in the Powder River Basin and the Greater Green River Basin which totalled 33 and 23, respectively. Within the Greater Green River Basin, the Moxa Arch, Washakie Basin, Wamsutter Arch, and the Red Desert Basin were again active. Also, the Thrust Belt, scene of extensive exploratory activity, accounted for five important discoveries.

Examination of the accompanying tables show an upward trend in terms of gas production and drilling success, a trend which is expected to continue into the future. This trend is partially explained by increased exploration in the deeper portions of Wyoming's basins spurred by increased gas prices. Completion of the Whitney Canyon-Carter Creek gas processing facilities in 1982 will allow these vast reserves to be tapped and should extend the increasing gas production trend well into the future. However, oil production and successful oil exploration seems to have leveled off and for the last two years has decreased. Declining production from the large old field like Salt Creek Field and even new large producers such as Hartzog Draw Field is not being offset by new discoveries. Hopefully, new large finds in the Thrust Belt will offset these production declines in the future.

WYOMING PRODUCTION SUMMARY

	Oil (barrels)	Gas (MMcf)
1975	135,942,508	319,883
1976	134,148,510	330,220
1977	136,148,510	338,260
1978	137,384,886	372,576
1979	129,605,875	404,293
1980	124,676,420*	436,041*

*estimated totals

Source: Wyoming Oil and Gas Conservation Commission

WYOMING DRILL SUMMARY

	Exploratory Wells			Development Wells				Average Active Rotary Rigs
	Oil	Gas	Dry	Oil	Gas	Dry	Totals	
1975	61	75	376	550	46	194	1256	107
1976	48	21	330	383	60	136	978	86
1977	48	53	361	550	96	169	1277	120
1978	49	35	444	561	127	151	1367	137
1979	45	54	401	586	185	214	1385	147
1980	52	50	305	539	198	227	1371	155

Source: Petroleum Information Corporation

WYOMING NEW FIELD DISCOVERIES

	1976	1977	1978	1979	1980
Powder River Basin	34	21	23	24	33
Bighorn Basin	4	6	3	5	3
Wind River Basin	3	2	7	11	2
Greater Green River Basin	24	39	26	22	23
Thrust Belt	2	1	2	3	5
Denver-Julesburg Basin	1	2	2	1	0
	66	71	63	66	66

Source: Petroleum Information Corporation

Looking at 1981, through the middle of the year, activity appears to be well ahead of 1979. Completions are running at a pace which could result in over 1600 total wells drilled in 1981. As the Drilling Summary Table shows, average active rotary rigs for 1980 was 155 and on August 31, 1981 the count was at 201 active rigs which should indicate an average count for this year well above the 1980 figure. The overthrust belt continues as the hot topic in 1981, with development drilling in Anschutz Ranch, East Field prompting the President of Amoco Production to estimate discovered potential reserves for that field at 800 million to 1.2 billion barrels of oil equivalent. The present total of discovered oil reserves for the entire state of Wyoming is only slightly over 800 million barrels.

VII. Coal

by Gary B. Glass, State Geologist, Geological Survey of Wyoming

Wyoming's 1980 production of 95 million tons boosted it to the third largest coal-producing state in the nation (behind Kentucky and West Virginia). This gain was consistent with an average increase of 22 percent a year for the last ten years. A persistent soft market, however, suggests Wyoming's projected 1981 production (108 million tons) will only increase by 12 percent over 1980. Although it is unclear if the estimated slackened pace will endure or worsen, our best guess is that annual production will increase at rates closer to 12 percent per year at least for the next few years.

As an indication of slackening market, Sun Oil noted in May that the 1981 price for its western production was down three cents a ton over prices it received in 1980. This followed an announcement by Exxon earlier this year that it had cut at least one of its contract prices (Wyoming Issues, vol. 4, no 2, 1981, p. 46).

Even the coal strike earlier this year failed to drum up any spot market for Wyoming coal. Apparently, local nonunion suppliers and adequate stockpiling by utilities averted any emergency need for western coal during or after the strike.

McGraw-Hills' Keystone Coal Industry Manual has listed the 15 largest coal-producing companies in the United States in 1980. Of these companies, eight have active coal mines in Wyoming (Amax, Arch Mineral, NERCO, Peter Kiewit, Kerr-McGee, ARCO, SUNEDCO, and Exxon). Another three (Peabody, Consolidation, and P & M Coal Mining Co.) have mines under development in Wyoming or began mining in 1981. Wyoming strip mines, incidentally, also account for 13 of the 50 largest mines in the nation, including the largest account for 13 of the 50 largest mines in the nation, including the largest (Amax's Belle Ayr mine).

In September, Secetary of Interior James Watt, advised western governors that the administration was probably not going to support federal bills providing for eminent domain for slurry pipelines. In regard to ETSI's proposed slurry pipeline from Wyoming to Arkansas, Watt indicated that Interior would not delay the federal Environmental Impact Statement or intervene in what he felt was a state matter. Watt also reiterated Interior's support for the concept of alternate transportation modes such as slurry lines.

Plans for Panhandle Eastern's coal gasification plant north of Douglas have been delayed or shelved again. Along with several other projects, this plant was shelved back in 1976 as well. Some financial partnerships in the venture were withdrawn in August when the federal Synthetic Fuels Corporation apparently failed to provide needed guarantees for the project. Costs for the plant's construction are variously reported as $2.5 - $3.5 billion.

In other synthetic fuel news, Standard Oil of Ohio (SOHIO) joined the Hampshire Energy group which is studying the possibility of building a coal liquification plant ten miles south of Gillette. The proposed plant will produce unleaded gasoline at the rate of 50,000 gallons/day as well as some butane byproducts. The other partners in this venture are Northwestern Mutual Life Insurance, Metropolitan Life Insurance, Kippers, and Kaneb Services. This project is still seeking $1.5 billion in price supports and loan guarantees from the federal Synthetic Fuels Corporation.

Coal Oil, and Gas Severance and Ad Valorem Tax Collections*

	1976		1977		1978		1979		1980	
	Severance	Ad Valorem	Severance	Ad Valorem	Severance	Ad Valorem	Severance	Ad Valorem	Severance	Ad Valorem
Coal[1]	$4986253	$7321256	$17716252	$11216632	$30277601	$18962219	$42935199	$23702694	$60128097	$37216429
Oil[2]	34781276	52011268	35958264	56580888	38602878	61492791	42594231	70046832	48842788	81218200
Natural Gas[3]	3554476	5416016	5317029	8363221	8947016	14157450	10575570	16951670	18245252	29195909

* Tax levies are based on the previous year's production.

[1] Severance tax was 4% in 1976, 9.7% in 1977, 10.1% in 1978, and 10.5% since 1979.
[2] Severance tax is 2% for Stripper Oil and 4% for Crude Oil.
[3] Severance tax is 4%.

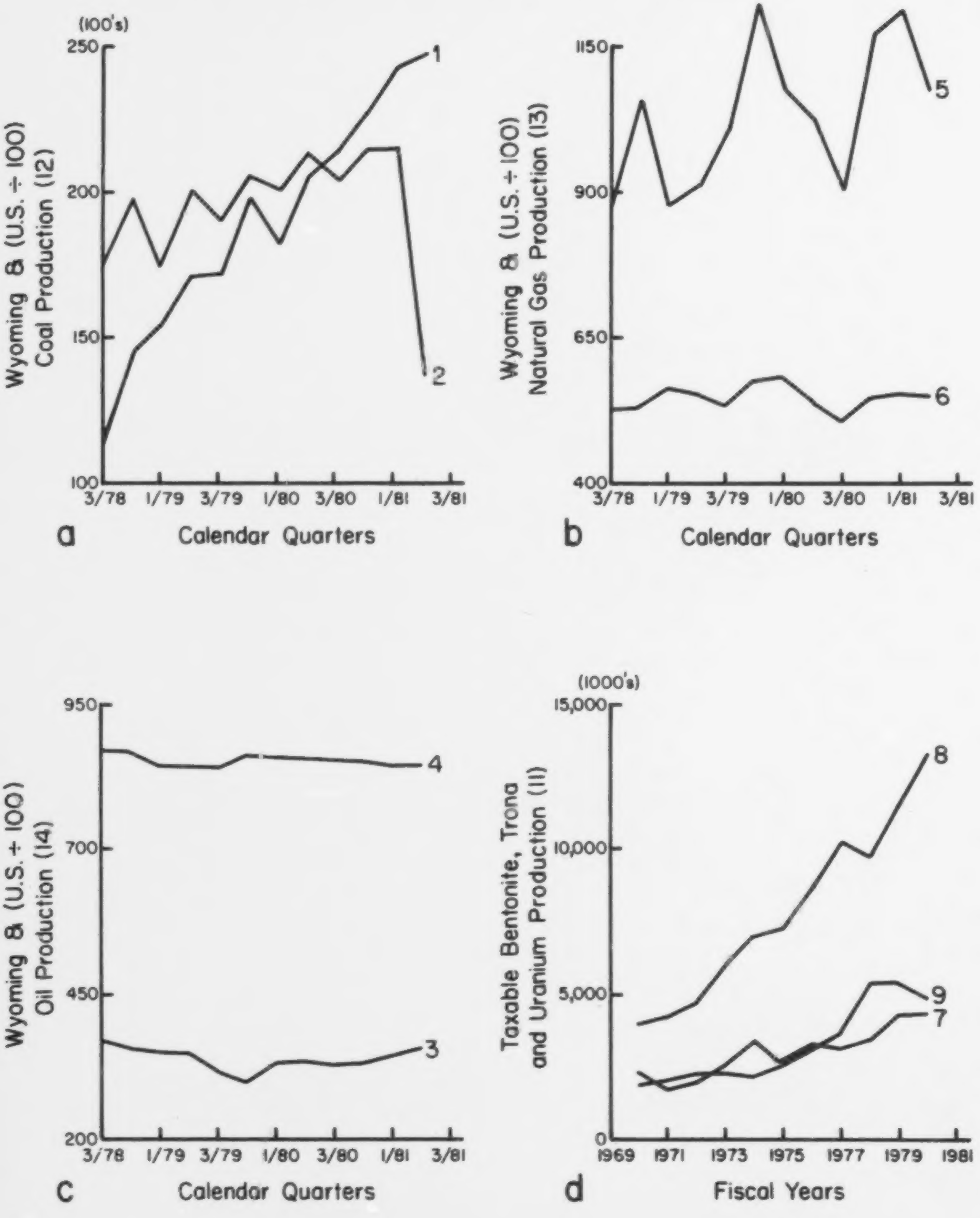
Oil, Gas, and Mineral Production Plans and Projections from Two Sources

	1981	1982	1983	1984	1985	1990
Coal (millions of tons)						
Minerals[4] Monitoring System	132.54	153.36	168.60	199.46	218.53	266.73
DEPAD[5] Mineral Yearbook	94.01	105.01	121.01	138.10	——	——
Oil (millions of barrels)						
DEPAD[5] Mineral Yearbook	114.50	115.00	115.5	116.0	——	——
Natural Gas (billions of cubic feet)						
DEPAD[5] Mineral Yearbook	450,000	500,000	550,000	600,000	——	——
Uranium (tons)						
DEPAD[5] Mineral Yearbook	5,500,000	5,500,000	5,500,000	6,000,000	——	——
Bentonite (millions of tons)						
Mineral Monitoring System	4.057	4.295	4.300	4.350	4.400	4.500
DEPAD[5] Mineral Yearbook	4.600	4.750	5.000	5.000	——	——
Trona (millions of tons)						
Mineral Monitoring System	13.50	13.90	13.90	13.90	14.10	14.80
DEPAD[5] Mineral Yearbook	14.15	15.00	15.50	15.50	——	——

[4] The Mineral Monitoring System was designed and implemented by Stuart/Nichols Associates and is currently maintained by the Department of Economic Planning and Development. The data are obtained via personal interview with each mine's representative. The last update was March, 81.

[5] Department of Economic Planning and Development, 1980. Production data are for private leases only. Federal and State Royalty production is not included in the data.

Figure 1: Energy & Mineral Production*



*Numbers next to trend lines indicate which data series on the adjoining table (next page) corresponds to the line.

Table 1: Energy and Mineral Production

Quarterly	3/78	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81
1. Wyoming Coal (12)	11385	14556	15349	17073	17119	19897	18249	20630	21314	22642	24312	24796
2. U.S. Coal	175033	198695	175608	200109	190780	204300	200763	212651	203560	214245	214400	139510
3. Wyoming Oil (14)	380	369	360	357	328	313	346	349[1]	348	349	351	364[1]
4 U.S. Oil (14)	8776	8739	8543	8500	8495	8600	8676	8629[1]	8605	8657	8570	8526[1]
5. Wyoming Natural Gas (13)	889	1057	874	911	1006	1273	1071	1028	901	1174	1219	1087[1]
6. U.S. Natural Gas (13)	53179	53825	56830	55382	54114	57087	58381	54300	51777	55344	54740	55836[1]
Fiscal Years	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980
7. Bentonite (11)	I.N.A.	2228978	1813066	2062384	2614779	3422635	2760871	3278765	3315783	3626652	4479242	4500000
8. Trona (11)	I.N.A.	4022304	4203677	4783946	6029984	7070617	7379792	8800607	10215602	9974237	11771985	13250000
9. Uranium (11)	I.N.A.	2042074	2044943	2390100	2588011	2287697	2736663	3302422	3986025	5517070	5512345	5000000

The second quarter of 1981 saw U.S. coal production drop dramatically in response to the U.M.W. coal miners strike. The Wyoming mines, being essentially non-union, continued to produce coal at ever higher levels. Second quarter production in 1981 was up 2.0% over the first quarter of 1981 and up 20.2% over second quarter 1980. The increase reflects both the lack of a strike and the growing demand for relatively inexpensive, low-sulfur Wyoming coal.

Due in part to the cyclical nature of demand for natural gas, Wyoming production was down in 2/81. An increase of 5.7% in production over 2/80 reflects a long run trend toward increasing production. The 2/81 national production figures for natural gas indicate only slight seasonality and little change over 2/80.

U.S. oil production for second quarter 1981 shows a 1.2% decline over the same quarter in 1980. Wyoming oil production, by contrast shows a 4.3% increase.

Bentonite, primarily composed of a fast expanding clay, is used in such areas as oil drilling and food additives. The Wyoming production of Bentonite leveled off in 1980. Over the long run, bentonite production has been increasing. 1980 production is up 101.9% over 1970 production.

Uranium production in Wyoming has dropped from its 1978 high in both 1979 and 1980. Despite these decreases, production increased 144.8% between 1970 and 1980.

Trona is a primary source of soda ash, and is used in glass making. 1980 saw a 12.5% increase over 1979 production levels of trona. This increase is only the latest of many which have seen trona production increase 229.4% from 1970 to 1980.

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[1] Datum shown is an estimate. Some data components were not received.

[2] Data do not include state and federal lands production.

Figure 2: Agriculture

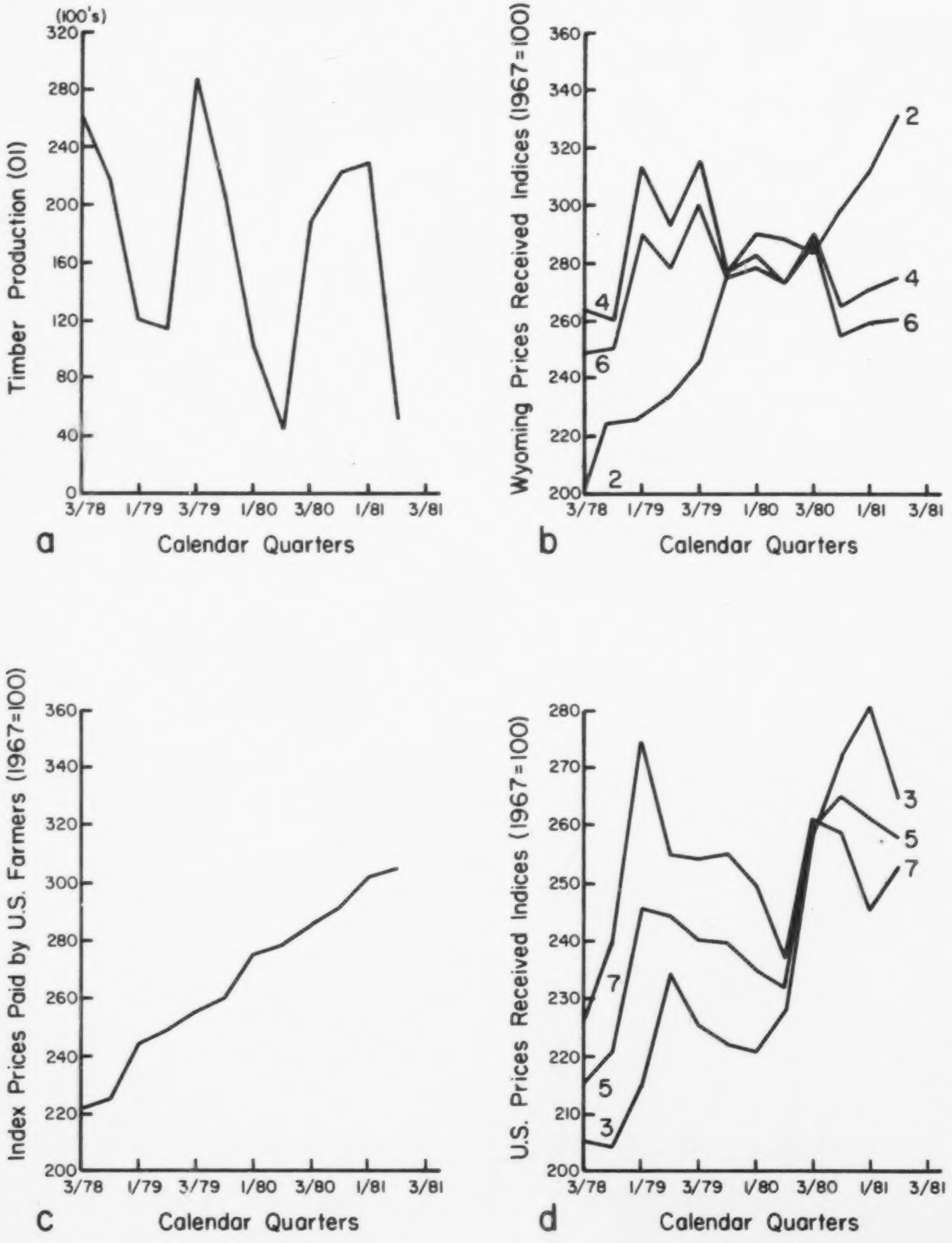

Table 2: Agriculture

Quarterly	3/78	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81
1. Timber Production (01) in Selected Wyoming National Forests	24497	21899	11991	11567	28618	20558	10043	4410	19128	22401	22715	5582
Price Indices[2] (1967=100)												
2. Wyoming Crops, Prices Received	202	224	225	233	247	278	290	288	283	299	312	331
3. U.S. Crops, Prices Received	205	205	215	234	226	222	220	228	259	272	281	265
4. Wyoming, All Commodities, Priced Received	249	252	290	279	301	278	285	273	288	265	271	277
5. U.S., All Commodities, Prices Received	217	222	246	244	240	239	234	232	261	265	262	258
6. Wyoming Livestock, Prices Received	264	260	310	292	316	278	283	274	290	255	259	260
7. U.S. Livestock Prices Received	227	239	274	255	254	255	247	237	263	259	246	253
8. Prices Paid by U.S. Farmers	223	226	244	249	255	260	276	278	286	292	302	306

Wyoming farmers and ranchers together (all commodities index) fared better during the last quarter than their U.S. counterparts, but fared worse over the last 4 quarters. Wyoming livestock prices are down 5.1% over a year ago. At the same time, production costs (U.S. prices paid index) rose 10.1% and living costs (Wyoming CPI) rose 10.7%.

Timber production data are indicative of the U.S. Forest Service's continuous sustained yield policy, and the seasonal variability of timber cutting. It is Forest Service policy to cut timber at approximately the rate of timber growth. Hence, once a timber-harvesting plan is established, the production data are characterized by very little long-run variability.

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[1] Data for the Bridger, Teton, Targhee, and Wasatch National Forests are not included.

[2] Index shown is for the final month of the quarter.

Figure 3: Tourism Indicators

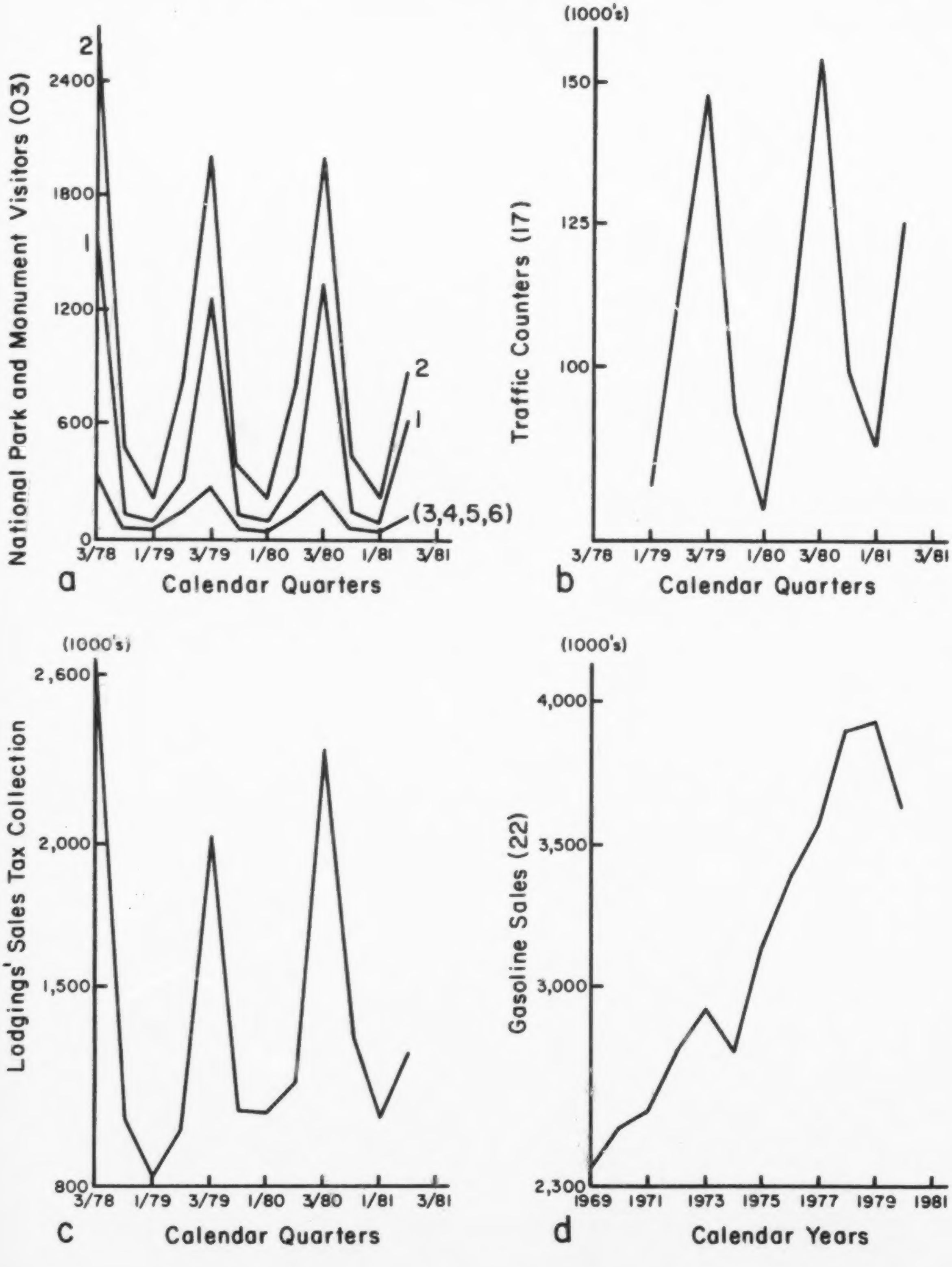

Table 3: Selected Tourism Indicators

Quarterly	3/78	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81
1. Yellowstone National Park Visitors (15)	1784742	113152	73925	458095	1251088	112061	89609	459974	1323837	144039	74693	609642
2. Grand Teton National Park Visitors (15)	2624230	449882	199191	854618	2023084	389457	205415	814813	2055989	412817	206147	847464
3. Devil's Tower Visitors (15)	174361	12032	8499	65754	140701	12606	7600	51992	144042	12346	13425	63064
4. Fossil Butte Visitors (15)	9252	1536	78	3612	8984	1404	91	2864	6857	1421	339	3795
5. Fort Laramie Visitors (15)	72069	6929	5294	29733	64685	7236	3630	27621	52608	6337	6309	40192
6. Big Horn Canyon (15) (South District)	58237	36644	16433	44483	54125	37334	10564	45481	49499	35422	18509	34846
7. Count at Selected Highway Traffic Counters (17)	I.N.A.	I.N.A.	79446	115056	147903	92168	75203	109530	154224	99772	86957	125992
8. Hotel, Motel and Camp Sales Tax Collections (08)	2,643	1,025	839	1,015	2,031	1,074	1,064	1,189	2,326	1,315	1,036	1,272
Annual	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980
9. Gasoline Sales (22)	2357740	2507188	2589976	2786387	2911815	2786998	3141331	3403996	3592468	3901116	3926998	3621806

The most direct measure of tourism is the actual count of visitors at the various parks and monuments. Because of the difficulty in seperating tourists from nontourists, and because of inprecise counting techniques visitation data really constitute estimates. The estimates do provide an indication of seasonal and year-to-year trends. The 2/81 data indicate a 13.99% increase in visitors to the parks and monuments over 2/80.

Another indicator used to evaluate tourism is the hotel, motel, and camp sales tax collections. Past data have shown us that this indicator follows the pattern set by the visitor counts, but with a long-run upward trend. This upward trend is due in part to inflation. From 2/79 to 2/80 the number of visitors declined 3.67%, while sales and use tax increased by 17.1%. During this same period the Wyoming inflation rate was 12.59. The 2/81 data indicate a reversal of that trend, with the number of visitors up 13.99% over second quarter of 1980 and the hotel, motel and camp sales tax up only 7.02%. During that period the inflation rate was 10.70% in Wyoming. For the two year period 2/79-2/81, visitation was up 9.8% and hotel, motel and camp sales tax collections were up 25.34% while inflation advanced an average 13.54% per year. Some error is accounted for by tax reporting and accounting procedures.

A third indicator is gasoline sales. Reported on a yearly basis, estimated from tax receipts, the level of gasoline consumption in Wyoming has declined for only the second time in the last twelve years. (The first corresponding to the Arab Oil Embargo of 1973-1974). The decline occured despite an increase in miles traveled in 1980 over 1979 (Table 11). One can speculate that it may be due to the decrease in the percent of motorists speeding (Table 11) and the growing number of fuel efficient cars.

The final means to detect changes in tourism is the use of traffic counters. These counters indicate a generally increasing number of cars are passing through Wyoming. The shape of the quarterly pattern coincides with the visitation data. Traffic in 2/81 is up 15.0% compared to 2/80, and up 44.9% from 1/81. Not all of the increases are due to tourism. The rapid growth of the state's population (+41% from 1970-1980) is prompting part of the increase.

Figure: 4 Employment & Labor

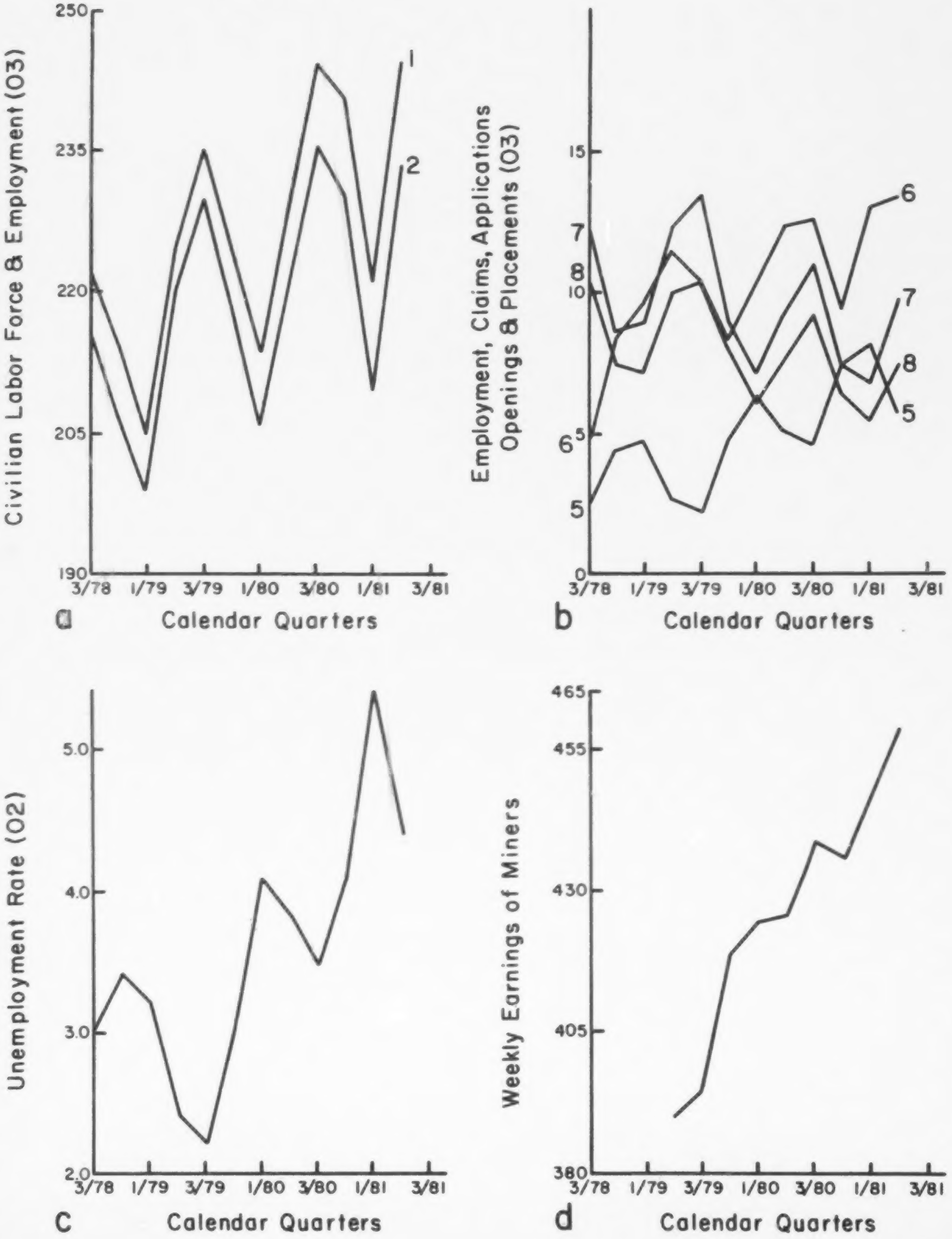

Table 4: Employment and Labor[1]

Quarterly	3/78	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81
1. Civilian Labor Force (03)	222465	214750	205450	225584	235587	225379	214579	228869	243987	240566	221590	244466
2. Employment (03)	215784	207347	198922	220174	230334	218571	205831	220080	235404	230685	209641	233690
3. Unemployment (03)	6681	7403	6528	5410	5253	6808	8748	8789	8583	9881	11949	10776
4. Unemployment Rate (02)	3.0	3.4	3.2	2.4	2.2	3.0	4.1	3.8	3.5	4.1	5.4	4.4
5. New Unemployment Insurance Claims Filed (03)	2312	4571	4850	2790	2200	4977	6466	5242	4745	7494	8231	5901
6. New Job Applications (03)	4867	8382	9839	11653	10667	8300[2]	10263	12481	12727	9584	13026	13522
7. New Non-Agricultural Openings Posted (03)	12591	8743	9028	12210	13513	9000[2]	7126	9217	11068	7526	6912	9903
8. New Non-Agricultural Job Placements (03)	10526	7656	7271	10099	10655	8100[2]	6211	7848	9218	6482	5649	7681
Mining Production Workers												
9. Average Weekly Hours	44.1	44.5	43.4	42.9	43.4	43.7	42.7	42.9	44.1	43.4	43.3	42.9
10. Average Weekly Earnings (05)	359.02	365.80	380.32	390.12	395.23	413.16	424.77	425.31	438.25	435.56	446.68	457.66
11. Average Hourly Earnings (05)	8.15	8.23	8.77	9.09	9.10	9.46	9.95	9.91	9.94	10.04	10.32	10.67

While the United States, as a whole, saw unemployment rates go up, in Wyoming the second quarter of 1981 saw the unemployment rate drop from a three year high of 5.4% in 1981's first quarter to 4.4%. Based on past trends we can anticipate a further reduction in the third quarter as important seasonal industries such as tourism and construction increase their activities. Unfortunately, the long-run trend of the umemployment rate for Wyoming seems to be upward.

The drop in the unemployment rate coincides with an increase in both the Civilian Labor Force and the overall number of persons employed in Wyoming. If past performance is any indicator, the third quarter of 1981 should produce both the largest number of employable persons and the largest number of persons employed in the last three years.

The unemployment claims while cyclical and going down in the second quarter of 1981, also appear to be steadily increasing when the time frame is expanded from quarters to years. Although, by nature countercyclical with respect to unemployment claims, the number of new job applications is also on the increase, reflecting increased population and the increasing levels of unemployment.

The second quarter of 1981 shows an increase in the number of nonagricultural job openings posted and filled over the first quarter of 1981. That increase however results in a total number of listings and placements which is below that achieved during the same quarters of 1980 and 1979.

The weekly earnings of miners in Wyoming is definitely on the increase, up 17.31% from second quarter 1979, up 7.6% from second quarter 1980 and up 2.46% from first quarter 1981. While these figures seem very large, the 10.70% increase in the cost of living reported for Wyoming during the 2/80 - 2/81 period would seem to show about a 3.10% loss of buying power.

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[1] The most recent year's data are preliminary

[2] Estimated; October 1979 data are not available

Figure 5: Business Conditions

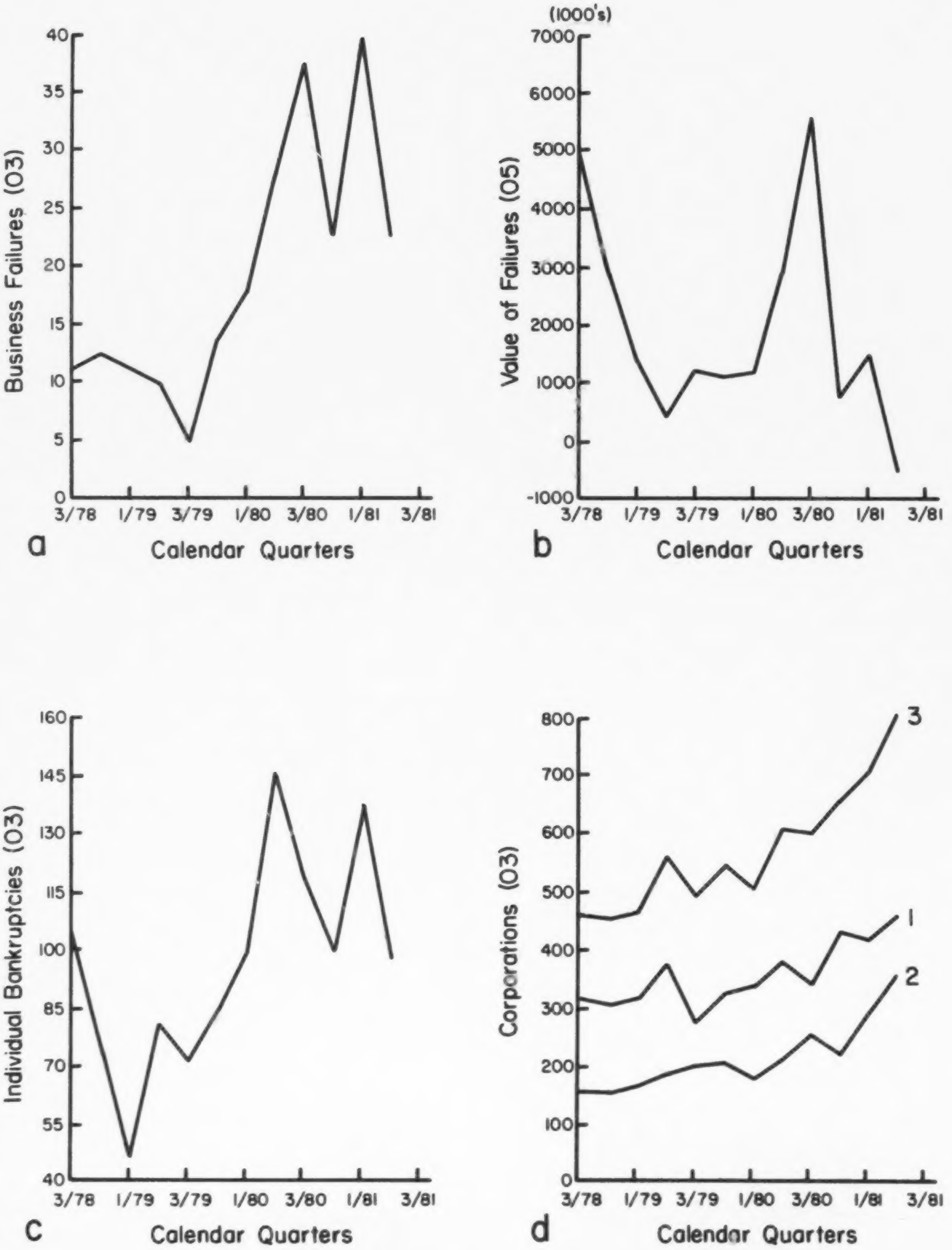

Table 5: Business Conditions

Quarterly	3/78	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81
1. New Domestic Corporations (03)	303	293	306	383	294	340	342	391	348	429	424	459
2. New Foreign Corporations (03)	161	159	162	186	201	209	175	212	252	239	294	357
3. Total New Corporations (03)	464	452	468	569	495	549	517	603	600	668	718	816
4. Business Failures (03)	11	12	11	10	5	13	18	28	37	23	39	23
5. Value of Business Failures (05)	4913250	2886008	1471387	419868	1429461	1079393	1307881	2985150	5565342	799288	1474498	-858446[1]
6. Individual Bankruptcies (03)	103	74	46	81	72	85	100	145	119	100	137	98

Figure 5a illustrates that the number of businesses which failed in 1/81 exceeds business failures in 2/81 by 41%. The dollar amount of the 2/81 failures has also decreased. Whereas the value of 1/81 failures totaled $1,474,498, the 2/81 failures presented a situation where assets exceeded liabilities. While the situation suggests that business conditions could be improvcing, i.e., fewer business failures and lower value attributed to these failures, the number of failures still exceed those of more than one year ago. The long term trend could be reflective of the prevailing high interest rates and the increased difficulty in attracting sufficient capital for investment.

Figure 5c reflects a decline in individual bankruptcies as well. There has been a 28% decline from 1/81 to 2/82, and a decline of 32.4% over the same quarter a year ago.

Figure 5d illustrates that the number of both domestic and foreign corporations are rising. The two areas taken together demonstrate a 13.7% increase since 1/81. The trend is indicative of Wyoming's continued growth despite problems in the national economy.

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[1] Assets exceed liabilities

Figure 6: Banking & Finance

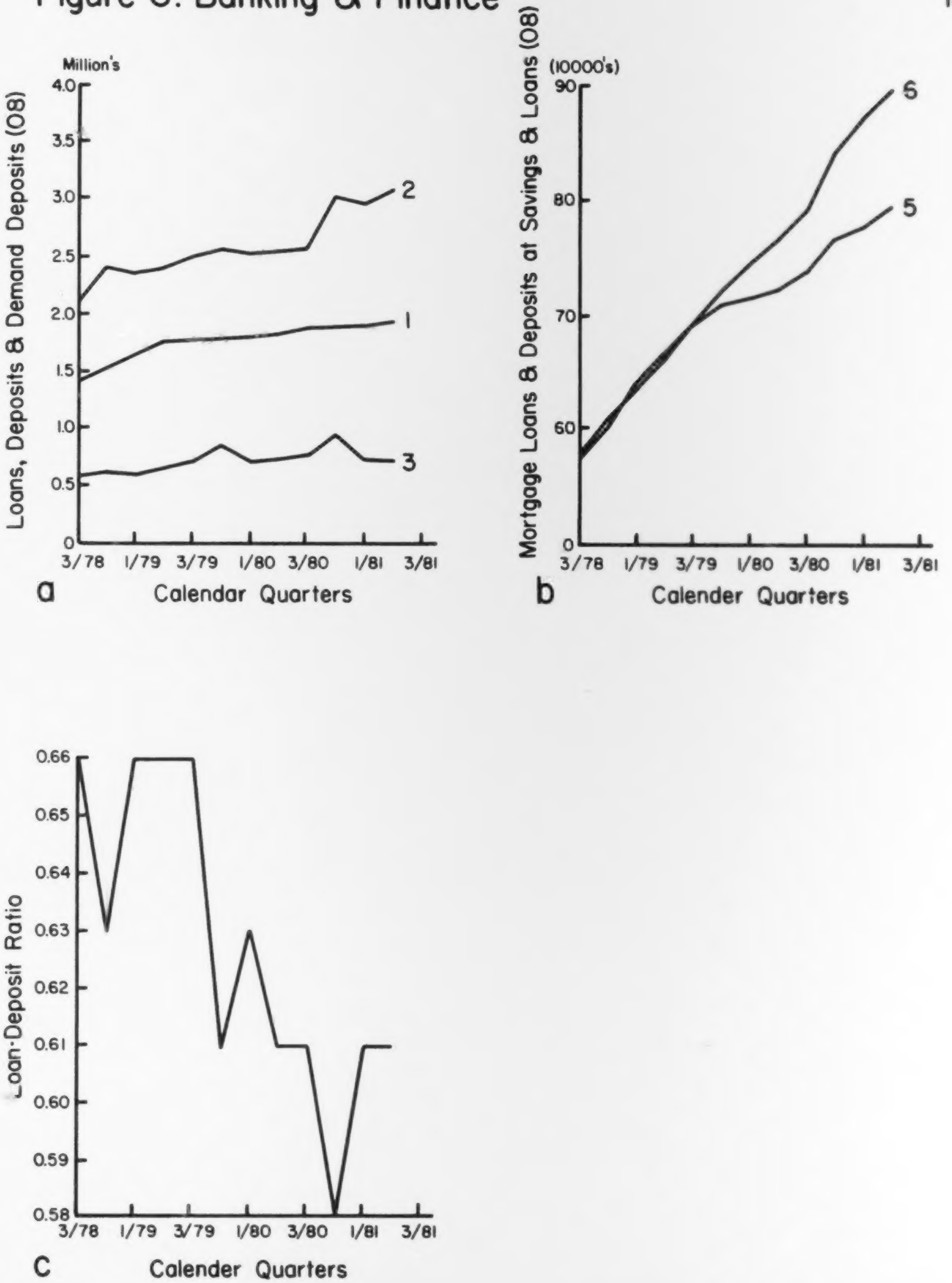

Table 6: Banking and Finance

Quarterly	3/78	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81
1. Total Bank Loans (08)	1496041	1514223	1531115	1618031	1667332	1661606	1677881	1689496	1722916	1764381	1808747	1898325
2. Total Bank Deposits (08)	2272138	2404163	2336169	2439970	2510176	2734107	2651863	2755238	2826427	3034647	2968348	3112270
3. Total Bank Demand Deposits (08)	690631	729293	674252	706104	748983	865452	746467	796838	839111	878444	736161	737837
4. Bank Loan - Deposit Ratio	.66	.63	.66	.66	.66	.61	.63	.61	.61	.58	.61	.61
5. Savings and Loan[1] Mortage Loans (08)	585824	611217	623282	648725	687735	706103	711387	719627	741479	770474	776172	788526
6. Savings and Loan[1] Deposits (08)	576996	607537	638431	666293	689301	724538	749815	770186	788448	842740	874533	891585

Figure 6a illustrates that total bank loans have risen by 4.95% since 1/81, total bank deposits have risen by 4.84% since 1/81, and total demand deposits have risen by less than 1% (.23%). While loans and bank deposits have grown by similar amounts, demand deposit growth lags far behind. The relatively slow growth in the first two reflect some growth due to inflation, and the higher return realized on savings invested elsewhere, such as money market funds, which capture much of the impact of high interest rates. The .23% increase in demand deposits reflects the high cost of holding money in non-interest earning assets when a prime interest rate near 20% is combined with Wyoming's inflation rate of 10.7% over the last year. Figure 6b shows that mortage loans savings and loan deposits have paralleled the growth in total loans and total deposits. Mortage loans have increased by 1.59% since 1/81 and savings and loan deposits have risen by 1.95% over the same period. This trend is consistent with the trend indicated in Figure 6a.

Figure 6c shows that the loan-deposit ratio has remained fairly constant.

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[1] Only members of the Federal Home Loan Bank Board are included.

Figure 7: Construction

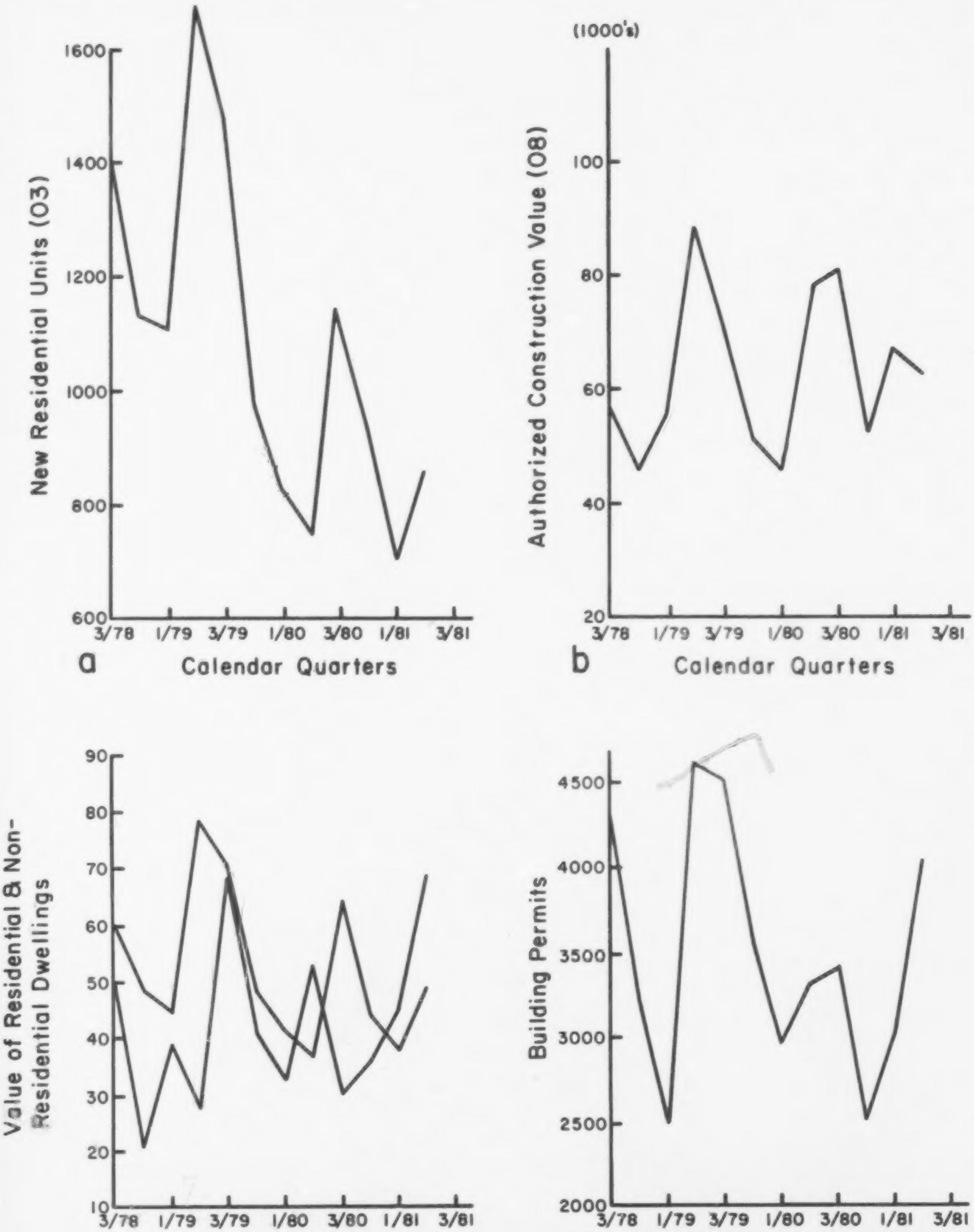

Table 7: Construction

Quarterly	3/78	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81
1. New Residential Dwelling Units (03)	1430	1136	1113	1680	1481	976	824	762	1140	942	720	855
2. Value of Residential Dwellings Constructed (06)	60.7	49.0	45.6	78.9	71.6	47.1	41.6	39.0	64.0	44.1	38.0	48.9
3. Value of Non-Residential Construction (06)	53.3	20.7	38.7	28.3	68.3	40.9	33.6	51.5	30.8	36.7	45.6	68.5
4. Building Permits Issued in Selected WY cities (03)	4441	3151	2661	4604	4515	3560	2934	3293	3414	2637	3027	4040
5. Value of Authorized Construction in Selected WY cities (08)	58835	45672	56756	88798	71643	53215	45371	77045	80648	52550	68995	63557

Figure 7 depicts the current economic atmosphere as it relates to the construction business. Figure 7a illustates that the number of new residential units being built has dropped since 3/78 by 40.2%. While this could be due to several economic and non-economic reasons, one possibility is the public's inability to qualify for home loans, and if they do qualify, their ability to afford those loans is uncertain as a result of the high interest rates charged. Figure 7b depicts the value of authorized construction which has grown by 8% since 3/78, (much less than the U.S. rate of inflation during that period of 36.3%) and has experienced wide fluctuation over the period, in particular, between 1/79 and 2/79 when there was a 56.5% increase. These fluctuations are in part due to seasonal factors. That is, as bad weather conditions occur, construction is forced to slow down.

Figures 7c and 7d also depict the current construction trends. While the value of non-residential construction in 2/81 exceeds 3/78 by approximately 22%, the value of residential dwellings has decreased by 19% over the same period. The figures become even more significant when viewed in light of the 36.3% advance of the U.S. Consumer Price Index from 3/78 to 2/81. This comparison may suggest that business construction is more successful since capital is more easily attracted Figure 7d also shows that even though there has been a steady rise (53%) in the number of building permits since 4/80, the total has not reached the point reached in 3/78. There has been a 9.1% decrease since 3/78.

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[1] Numbers appearing in this table may differ slightly from source data due to summing of rounded data.

Figure 8: Utilities

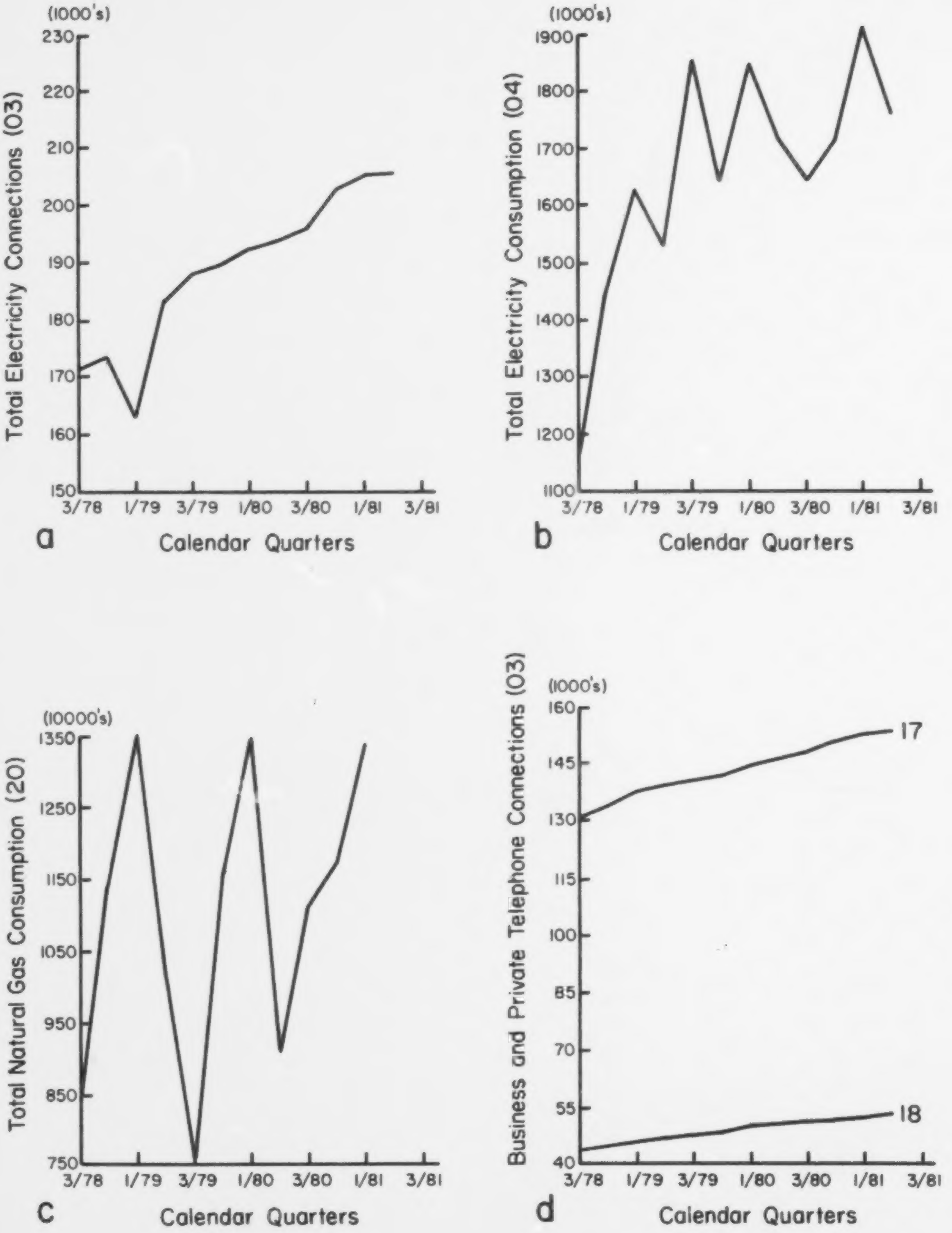

Table 8: Utilities

Quarterly	3/78	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81
1. Residential Electric Connections (03)	140366	142624	134249	149212	152198	154682	157183	158424	160950	166342	168477	169494
2. Residential Electric Consumption (04)	215584	294235	388504	295537	243384	335770	430258	319866	264960	335159	487386	331256
3. Commercial Electric Connections (03)	23446	24409	23044	26196	26762	27071	27208	27772	28072	28847	29465	29605
4. Commercial Electric Consumption (04)	255176	242095	272535	260014	273717	265711	282677	267804	287954	271561	298580	288617
5. Industrial Electric Connections (03)	3182	2820	2704	3283	3352	2891	2891	2957	3057	3312	3377	3384
6. Industrial Electric Connections (04)	845895	898607	938251	939332	1254562	986892	1092324	1096646	1013672	1049382	1100964	1097628
7. Other[2] Connections (03)	4147	3515	3223	3526	4890	3794	4743	3986	3875	3946	3579	3266
8. Other Consumption (04)	77811	40449	34342	38431	78105	51980	40623	34114	80540	55639	30333	45006
9. Residential Natural Gas Connections (03)	61264	62951	63457	62765	62977	62977	65346	65731	69297	72468	73699	73712
10. Residential Natural Gas Consumption (04)	817872	3010805	5070980	2323223	861109	2556825	4236345	2311300	787701	2770400	3923502	2180779
11. Commercial Natural Gas Connections (03)	5927	6107	6147	6396	6161	5997	6095	6026	6360	6561	6595	6557
12. Commercial Natural Gas Consumption (20)	462765	1465787	2623980	1101504	367443	1132437	1872572	976489	347976	1125956	1766515	970295
13. Industrial Natural Gas Connections (03)	97	105	119	100	99	87	87	97	91	93	92	94
14. Industrial Natural Gas Consumption (20)	7277938	6886104	5745774	6602746	6322784	7734080	6428686	5564123	9887644	7647357	7345317	5607535
15. Other Natural Gas Connections (03)	164	170	132	216	222	222	189	216	342	363	348	344
16. Other Natural Gas Consumption (20)	35906	59300	57156	153280	113356	209720	905798	261674	98459	204268	252249	147575
17. Business Telephone Connections (03)	130699	133786	136662	137967	139457	142877	144906	145863	147317	149949	152263	152980[3]
18. Private Telephone Connections (03)	42696	43593	44178	46337	47448	47748	49252	50367	50876	51043	52272	53179[3]

Business and private telephone connections have grown steadily during the 2.75 years since the 3rd quarter of 1978 at approximately 6.2 and 8.9 annual percentage rates respectively. The growth in connections reflects the state's population growth along with a trend towards fewer persons per household. Natural gas consumption, as expected, is characterized by strong seasonal use patterns.

On a four-quarter basis (July-June), the most recent 4 quarters indicate a 3.1% increase in gas use over 3/78-2/79, and a 7.7% increase over 3/79-2/80. The seasonal variability of electricity consumption is not as pronounced as for gas. Second quarter, 1981 electricity consumption is 2.6% and 14.9% greater than 2/80 and 2/79 respectively.

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[1] Some small utilitites do not report, hence the data are slightly less than the actual state totals. Data are consistent. The same utilities' reports are included in each figure.

[2] Other includes Agriculture, Municipal, and Other Public

[3] Preliminary

Figure 9: Consumers

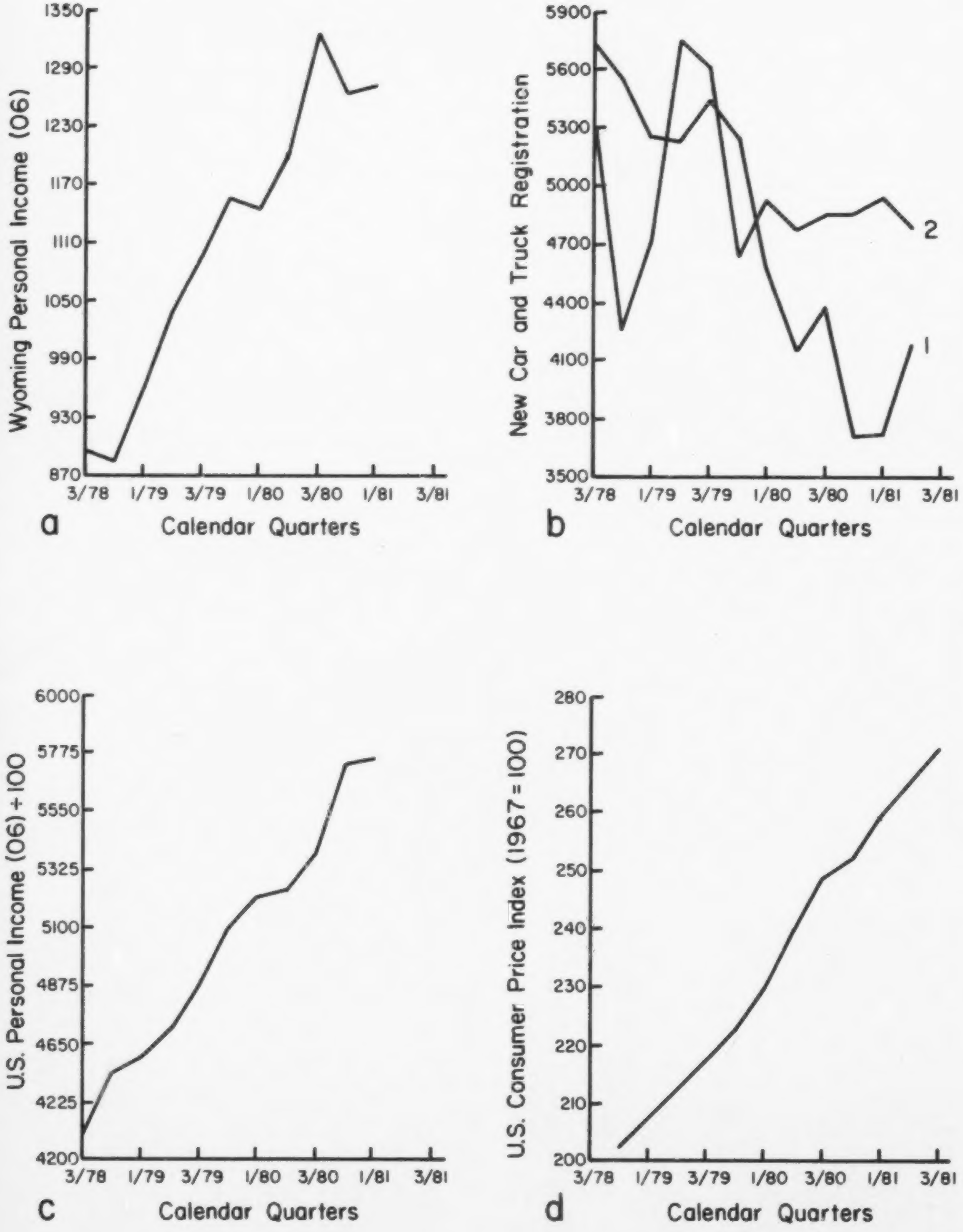

Table 9: Consumers

Quarterly	3/78	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81
1. New Truck Registration (03)	5693	5446	5241	5223	5435	5248	4593	4134	4353	3706	3723	4175
2. New Car Registration (03)	5288	4249	4681	5765	5628	4608	4937	4787	4859	4839	4926	4879
3. Wyoming Personal Income (06)	897	885	959	1040	1098	1158[3]	1143	1200	1326	1264	1268	I.N.A.
4. U.S. Disposable[*] Income (07)	1476	1525	1572	1602	1640	1683	1765	1784	1841	1897	1948	1985[2]
5. U.S. Personal Income (06)	430779	454647	460875	470299	488614	510219[3]	521332	525283	541561	572873	574971	I.N.A.
6. U.S. Consumer[1] Price Index (1967=100)	199.1	202.9	209.3	216.9	223.7	230.0	239.9	247.8	251.9	258.7	265.2	271.4

New car and truck registration data continue to reflect the impact of high interest rates. Despite an increase in Wyoming's population of approximately 11% from July 1978 to April 1980 (1978 census estimate and 1980 census data respectively), new car and truck registrations in 1/81 are down 12.8% from 1/79. Registration data for 2/81 are up only 3.5% from 1/81, and virtually the same as a year ago.

Second quarter personal income data were not available at press time. First quarter data indicated that state personal income (+11.0%) growth since 1/80 barely outstripped inflation (Wyoming CPI = +9.89%). U.S. personal and disposable income grew 10.3% and 10.4% respectively over the same period.

The Wyoming Comparative Cost of Living Indices show that Jackson continues to be the state's most costly place to live; due primarily to housing costs. Lusk remains the least costly. According to the Wyoming Department of Administrative and Control, the state inflation rate was 10.7% over the last 4 quarters; 1.2% higher than the national rate over the same period. Housing and medical costs led the way.

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[*] Seasonally adjusted at annual rates

[1] Number shown is for last month of each quarter

[2] Preliminary. An estimate based on trend and first 2 months of quarter

[3] Estimated. Nov. 1979 data are missing

[4] 1/79 means first quarter of 1979

Consumers

Wyoming Comparative Cost of Living Index* (July 8-10, 1981): Cheyenne = 100

CITY	RANK	ALL ITEMS	FOOD	HOUSING	TRANSPORTATION	MEDICAL
Jackson	1	122.14	98.99	148.31	98.90	101.15
Casper	2	111.01	105.51	121.01	102.85	105.72
Kemmerer	3	110.88	100.10	123.37	102.73	95.50
Evanston	4	110.64	100.65	123.09	98.87	98.33
Riverton	5	109.28	106.76	116.02	102.33	101.34
Rock Springs	6	109.18	104.17	115.82	106.75	96.65
Sheridan	7	109.02	101.13	117.82	100.71	98.62
Gillette	8	108.90	106.09	113.79	102.55	103.16
Douglas	9	108.04	110.92	107.77	103.38	111.10
Newcastle	10	107.06	113.98	109.61	96.96	102.79
Wheatland	11	106.09	109.74	106.86	101.62	96.10
Thermopolis	12	104.62	108.46	105.64	96.58	103.34
Rawlins	13	103.83	104.90	109.21	100.77	89.73
Laramie	14	102.75	97.49	108.88	97.58	88.64
Buffalo	15	101.66	106.10	101.22	99.16	99.45
Pinedale	16	101.43	102.68	100.51	100.02	100.66
Cody	17	100.94	111.34	99.32	98.82	95.02
Sundance	18	100.44	102.82	100.79	99.16	100.98
Cheyenne	19	100.00	100.00	100.00	100.00	100.00
Worland	20	98.19	102.82	95.34	97.75	96.06
Greybull	21	92.60	100.57	83.18	99.18	90.74
Torrington	22	91.95	99.21	82.18	97.45	97.63
Lusk	23	90.03	97.65	77.38	97.24	98.02

Wyoming Comparative Cost of Living Index* (April 8-10, 1981): Cheyenne = 100

CITY	RANK	ALL ITEMS	FOOD	HOUSING	TRANSPORTATION	MEDICAL
Jackson	1	120.04	97.97	143.52	99.36	102.93
Evanston	2	113.00	99.54	128.69	100.82	99.54
Rock Springs	3	111.35	102.70	122.54	103.53	97.84
Casper	4	110.76	101.11	120.46	105.57	104.16
Pinedale	5	110.59	102.47	123.29	99.84	96.80
Riverton	6	110.03	107.78	115.73	104.47	102.82
Gillette	7	107.42	107.26	110.47	101.88	105.10
Sundance	8	107.26	100.85	116.99	99.33	99.24
Thermopolis	9	106.27	113.25	107.52	98.62	98.48
Newcastle	10	105.78	106.97	110.54	97.56	98.97
Sheridan	11	105.67	102.56	107.86	104.02	97.47
Rawlins	12	105.38	103.49	113.55	99.99	91.14
Douglas	13	104.55	107.91	102.29	102.79	110.22
Wheatland	14	104.49	107.81	104.84	102.34	96.09
Laramie	15	104.35	98.43	111.73	98.10	91.67
Cody	16	102.80	107.39	105.76	98.44	103.65
Kemmerer	17	102.78	95.38	107.99	99.71	96.75
Worland	18	100.22	103.61	99.37	98.18	97.02
Cheyenne	19	100.00	100.00	100.00	100.00	100.00
Buffalo	20	98.85	105.15	95.41	99.92	90.50
Torrington	21	96.16	97.02	95.35	96.53	95.94
Greybull	22	95.61	101.07	89.38	99.00	92.99
Lusk	23	93.84	99.14	85.91	96.67	98.34

Source: Wyoming Department of Administrative and Fiscal Control

*Apparel and Recreation Indices not shown.

Government

ELECTION RETURNS November 4, 1980

I. Presidential

County	R. Reagan (R) G. Bush	J. Carter (D) W. Mondale	Ed Clark (L) D. Koch	J. Anderson (I) P. Lucy
Albany	5,830	3,772	295	1,630
Big Horn	3,709	1,212	93	209
Camphell	5,613	1,400	196	460
Carbon	4,337	2,272	181	493
Converse	2,987	922	105	215
Crook	1,909	413	24	70
Fremont	9,077	3,307	288	731
Goshen	3,572	1,373	101	269
Hot Springs	1,602	745	72	136
Johnson	2,291	635	83	139
Laramie	15,361	9,512	615	2225
Lincoln	3,412	1,063	99	120
Natrona	16,801	7,111	992	1768
Niobrara	1,075	270	29	38
Park	6,435	1,718	162	496
Platte	2,642	1,555	159	262
Sheridan	5,649	3,034	322	641
Sublette	1,538	357	48	139
Sweetwater	6,265	4,728	248	826
Teton	3,004	1,361	183	664
Uinta	2,738	1,138	86	189
Washakie	2,634	945	88	230
Weston	2,219	584	45	122
TOTAL	110,700	49,427	4,514	12,072

II. U.S. Representative

County	Dick Cheney (R)	Jim Rogers (D)
Albany	7,447	3,973
Big Horn	3,538	1,073
Campbell	5,949	1,595
Carbon	4,728	2,539
Converse	3,151	1,057
Crook	1,940	444
Fremont	8,862	3,749
Goshen	3,058	1,489
Hot Springs	1,781	685
Johnson	2,403	565
Laramie	15,738	10,625
Lincoln	3,224	1,294
Natrona	18,696	7,516
Niobrara	1,086	303
Park	6,674	1,895
Platte	2,582	1,617
Sheridan	6,723	2,948
Sublette	1,631	403
Sweetwater	5,936	5,301
Teton	3,811	1,186
Uinta	2,561	1,517
Washakie	2,669	894
Weston	2,173	670
TOTAL	116,361	53,338

Source: Wyoming 1981 Official Directory and 1980 Election Returns
Compiled by Thyra Thompson, Secretary of State.

Figure 10: Government

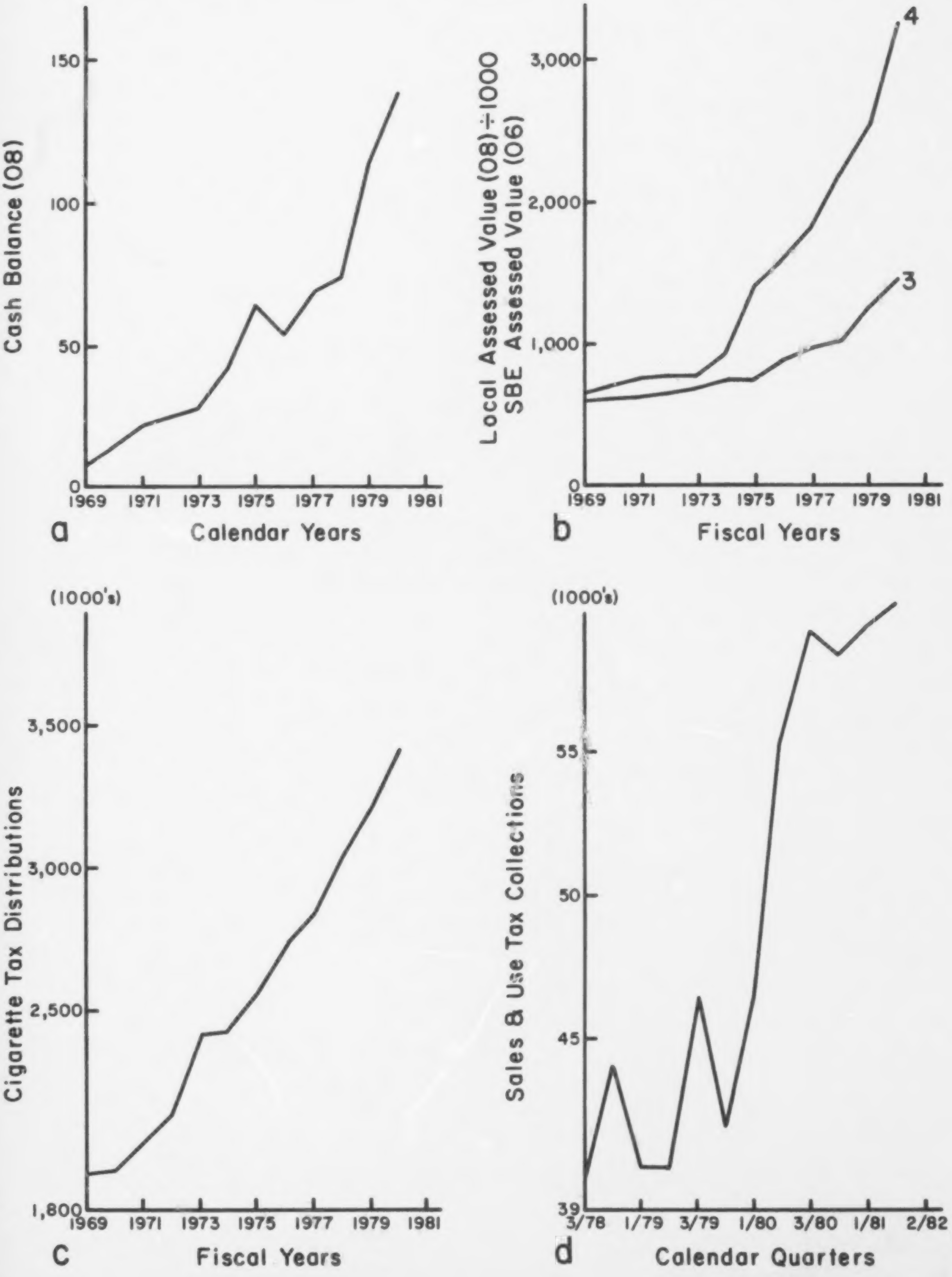

Table 10: Government

Fiscal Years	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980
1. Year end General Fund Cash Balance (08)	9017	14251	22469	25648	28944	42988	65516	55115	67542	73540	115318	140203
2. Cigarette Tax Distributions to Cities, Town, and Counties (05)	1933159	1949653	2047395	2154581	2418061	2436332	2581473	2754790	2859314	3044161	3212056	3414416
3. Locally Assessed Valuation (08)	609407	620678	636232	661655	697094	756251	758249	885462	970776	1020443	1156840	1261391
4. State Board of Equal. Property Valuations (06)	627.6	697.2	748.2	774.3	789.0	952.7	1410.2	1603.9	1833.4	2231.3	2545.8	3253.7
Quarterly	3/78	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81
5. Sales and Use Tax Collections (08)	39727	44072	40605	40689	46569	41993	46409	56658	59173	58322	59218	60174

During the period 1969-1980 the general fund cash balance has grown 1454.8%. During Fiscal Year 1980 alone the balance grew 21.57%. The 1980 Fiscal year-ending balance was equivalent to 68.6% of that years general fund expenditures.

The tax on cigarettes is partially (61.75%) distributed to the cities, towns and counties of the state. The actual dollar amount of these distributions is increasing at a slightly increasing rate. Fiscal year 1980 distributions are up 6.3% over Fiscal year 1970 distributions; 6.2% less than the rate of inflation prevailing in Wyoming at that time.

The sales and use tax collected in the State of Wyoming continued to increase, but at a rate below the rate of inflation. Second quarter 1981 data indicate a 6.2% increase over the same quarter of the previous year. During this period inflation in Wyoming was about 10.7%. The large increase in collections during second quarter 1980 over first quarter 1980 (about 22%) may in part reflect the initiation of compliance with the law requiring the matching of a "use tax" to the sales tax in each county. The law required compliance by January 1981.

Figure II: Transportation

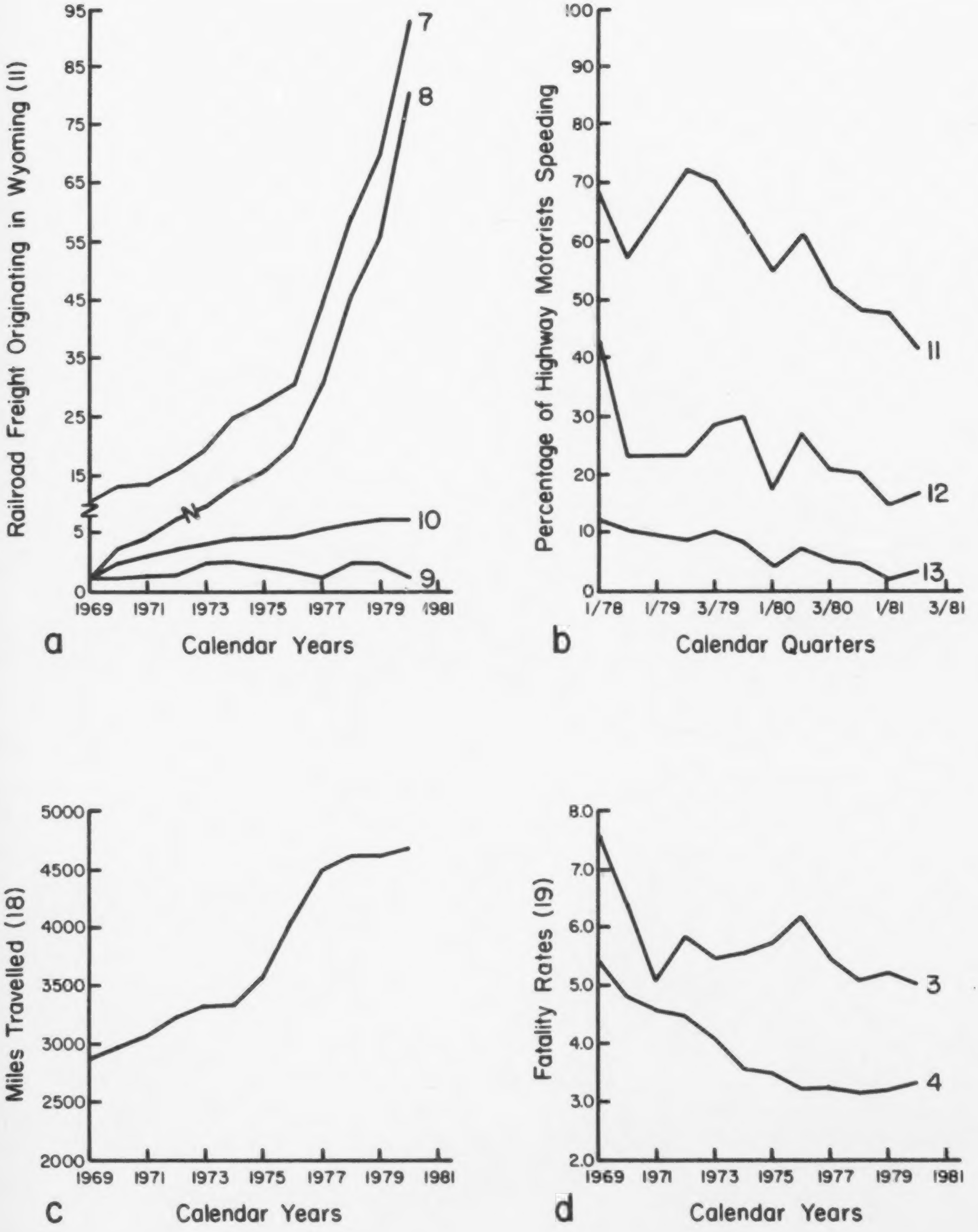

Table 11: Transportation

Annual	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980
1. Cost of Motor (05) Vehicle Accidents	I.N.A.	27105220	26261000	33616560	41118560	45166150	49862400	60746320	71169100	83570600	89682900	92457530
2. Traffic Deaths (03)	221	194	166	197	192	195	213	260	250	241	244	245
3. Wyoming Traffic (19) Fatality Rate	7.61	6.37	5.19	5.85	5.55	5.65	5.78	6.25	5.56	5.18	5.23	5.14
4. US Traffic Fatality Rate (19)	5.30	4.91	4.68	4.50	4.19	3.65	3.50	3.30	3.38	3.27	3.33	3.41
5. Mileage Travelled (18)	2902	3045	3198	3369	3459	3453	3682	4157	4500	4649[2]	4669	4763
6. Total Vehicles (17) Registered	244364	255282	268274	283841	304749	320799	353102	I.N.A.	390236	425949	449408	477352
7. Total Rail (11) Originating Freight	10384497	12583037	13458486	15696319	19311156	25939009	27454873	32584851	44737579	59000303	70171121	93597045
8. Rail Coal (11) Shipments[1]	1633849	3764019	4692684	6499687	8986612	14297433	16930748	21213852	32600559	46219779	56954437	80628760
9. Rail Stone, Clay and Glass Products[1]	2018483	2104482	2120419	2183426	2530288	2626173	2440057	2366499	2163627	2548751	2567728	2263276
10. Rail Chemical and Allied Products[1]	2351406	2570464	2739638	2993475	3501912	3891809	4141408	4953661	6003743	6539015	6843107	68324426

Quarterly	3/78	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81
11. % of Motorists Exceeding 55 m.p.h.	69.4	48.7	I.N.A.	72.1	71.0	63.1	55.1	62.5	53.2	49.1	48.7	42.9
12. % Exceeding 60 m.p.h.	43.1	24.7	I.N.A.	24.1	28.5	30.6	18.3	27.9	21.5	20.7	15.3	16.6
13. % Exceeding 65 m.p.h.	12.5	11.1	I.N.A.	9.0	11.7	9.7	4.7	8.0	6.3	5.6	3.9	4.1

Figure 11a indicates an increasing rate of growth in rail freight originating in Wyoming, with an increasing share of the total being accounted for by coal shipments. Total rail shipments originating have increased more than eight-fold from 1969 to 1980.

The long-run trend (Figure 11b) evident in each of the classes of speeders is one of decline, with some seasonal variability due to changes in driving conditions. One can only speculate on whether the decline is due to better law enforcement, higher fuel prices, or greater interest in highway safety.

Despite higher fuel prices, total miles travelled have increased. 56.4% from 1970 to 1980; more than Wyoming's approximately 41% growth in population over the same period. Despite the increase in miles travelled, the number of annual traffic deaths has changed very little; hence, the long-run decline in the fatality rate. Despite the decline in the Wyoming traffic fatality rate, it remains consistently higher than the fatality rate for the nation. Several geographic and related behavioral factors may account for the difference. Wyoming is very sparsely populated which results in many miles being travelled over wide open spaces. Such geographic factors can result in drivers being less attentive while driving. The existence of severe winter conditions, areas of high winds, and many two-lane highways also influence Wyoming's fatality rate.

---

[1] Shipments originating

[2] Estimated by Highway Department

Key to Units Code

01	THOUSAND BOARD FEET
02	PERCENTAGE
03	NUMBER OF INDIVIDUALS
04	THOUSAND KILOWATT HOURS
05	DOLLARS
06	MILLIONS OF DOLLARS
07	BILLIONS OF DOLLARS
08	THOUSANDS OF DOLLARS
09	NUMBER OF HOUSEHOLDS
10	HUNDREDS OF DOLLARS
11	SHORT TONS
12	THOUSAND SHORT TONS
13	MILLION CUBIC FEET PER DAY
14	THOUSAND BARRELS PER DAY
15	INDIVIDUAL VISITORS
16	GALLONS
17	VEHICLES
18	MILLION MILES
19	FATALITIES PER MILLION MILES
20	THOUSAND CUBIC FEET
21	KILOWATT HOURS
22	HUNDREDS OF GALLONS

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B. Series 9 - 16
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Institute for Policy Research
P.O. Box 3925, University Station
University of Wyoming
Laramie, Wyoming 82071

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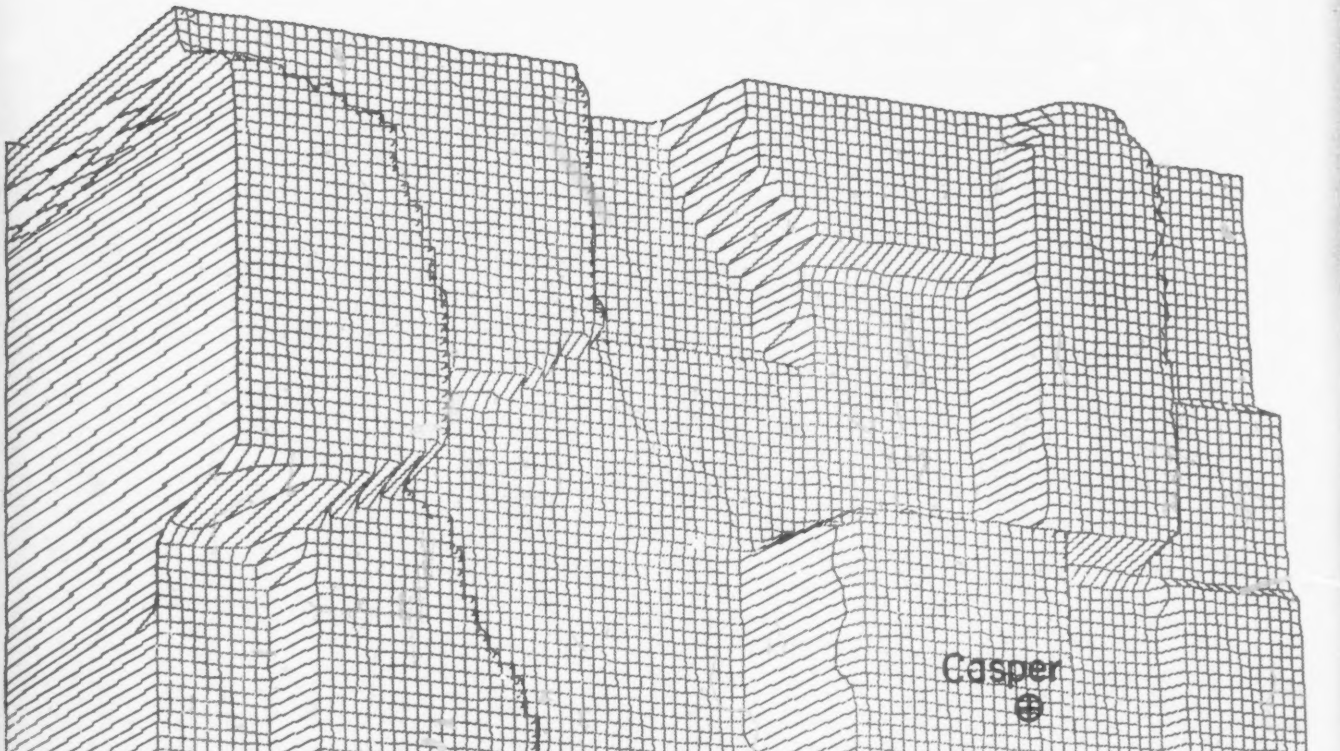
Casper
Cheyenne

1978 Per Capita Personal Income

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Wyoming Quarterly Update

Wyoming Quarterly Update (WQU) represents the efforts of the Institute for Policy Research (IPR) at the University of Wyoming to provide improved data access services. Over 120 data series in twelve major subject areas are presented in the second edition of WQU. The data presented in WQU are assembled from secondary sources, such as government agencies and private industry. The staff of IPR greatly appreciates the ongoing cheerful co-operation of each of the data sources listed in the bibliography.

The WQU effort was undertaken for two primary reasons. The first was a desire to provide current economic indicators. The second was to meet the need throughout Wyoming for timely, easily accessible data. Most of the data published in WQU are updated quarterly with the most current numbers. The complete data sets from which WQU originates are maintained, together with documentation, in machine-readable form by IPR. Many data series, such as gasoline sales and taxation data, span more than 30 years. Numerous other series cover 20 years or more.

Efforts to expand the subject and geographic detail (county level data) of data sets will be made continuously. In future editions, the reader can look forward to even more extensive use of graphs and maps for visual interpretation of data. Expert commentary on the outlook for various economic sectors has been expanded, from two sectors in the last edition to five sectors in this edition. Each subsequent edition of WQU will feature seven to nine expert commentaries. The WQU staff is very grateful to these expert commentators for their contributions.

The cover page of each edition features a contour map which illustrates the geographic distribution of a particular variable. This edition features a contour map of the per capita personal income of each county in 1978.

First-time readers of WQU should refer to the "Format Description" (last page) for an explanation of numerical codes and table formats.

For additional information, to make suggestions, or to request data, contact WQU project co-manager John Merrifield at:

The Institute for Policy Research
University Station, Box 3925
Laramie, WY 82071
(307) 766-5141

Institute for Policy Research
College of Commerce and Industry
and College of Arts and Sciences
University of Wyoming

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Project Managers...John D. Merrifield
Bob Senser

Editorial Advisors..Shelby Gerking
G. Fred Doll

Word Processing...Lorri Fuhs Pedersen
Research Aides..R. Bruce Waldo
Julie Gizinski

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THE WYOMING SCENE
Synopsis and Outlook

by John Merrifield

The fourth quarter of 1981 began with both good and bad economic news, particularly on the national level. The Economic Recovery Tax Act of 1981, the centerpiece of Reaganomics, went into effect October 1, just as a deepening recession became apparent. According to the Survey of Current Business (August, 1981, pg. 1) the Gross National Product (GNP) declined at an annual rate of 2½ percent in the second quarter of 1981. Third quarter GNP was up at an annual rate of 0.6 percent (CBS Radio News, November 19, 1981). However, the increase was attributed to inventory accumulation, an indication of possible reductions in output later. According to a CBS Radio News report (November 9, 1981), the Reagan Administration conceded that an annual rate of GNP decline of 3.5 percent is likely for the current quarter. Additional bad news came in the form of higher unemployment. U.S. News and World Report (USNWR, November 16, 1981, pg. 87) indicates that the unemployment rate was up to 8.0 percent in October, with many analysts expecting an 8.5 percent rate by early 1982. The sharp drop in auto sales (GM, nearly 30 percent, and Ford, 25 percent) in October (CBS Radio News, November 4, 1981), and a 12.64 percent drop in housing sales in September (CBS Radio News, October 30, 1981), the largest decline since 1963 when records were first kept, were major contributors to the 1.5 percent decline (CBS News, November 13, 1981) in industrial output in October.

President Reagan's effort to prevent the Senate from blocking the AWACs sale to Saudi Arabia was followed by an announcement by the Saudis that OPEC had agreed on a $34 per barrel unified crude oil price, and that Saudi Arabia would cut its production by one million barrels per day (USNWR, November 9, 1981, pg. 18). Most analysts expect an eventual 2.5 cents-per-gallon increase in the price of gasoline (ibid.).

The immediate future of the economy does not look any better than the present and recent past, and, in some areas, it looks worse. "The government's index of leading indicaters dropped 2.7 percent in September, fourth--and biggest--decline in five months" (USNWR, November 9, 1981, pg. 69). Falling stock market prices and shorter average factory workweeks were the major factors in the decline. Murray Wiedenbaum, chairman of the president's Council of Economic Advisors, while promising a "strong upturn by mid-1982 or sooner" admitted that the near-term economic outlook was not good (CBS Radio News, November 9, 1981). Later, Mr. Wiedenbaum conceded that unemployment might reach 9.0 percent before the promised mid-1982 upturn (CBS "Face the Nation," November 15, 1981).

As the third quarter ended, it became increasingly apparent that the government was going to continue to be a big borrower. Even if President Reagan gets all ($13 billion) of the additional budget cuts he requested in September, the White House is expecting a deficit of at least $80 billion for the current fiscal year, and "triple digits" in 1983 and 1984 (USNWR, November 16, 1981, pg. 24-5). Given those figures, Treasury Secretary Regan's admission before Congress on October 30 (CBS Radio News) that a balanced budget in 1984 was "improbable" was certainly an understatement. Growing government deficits, and the continuing tight money policy of the Federal Reserve Board, will maintain strong upward pressure on interest rates for some time.

Fortunately, the news is not all bad. The nation's annual inflation rate for the first nine months of 1981 was 10.5 percent. This represents a drop of two percentage points from the 1980 inflation rate of 12.5 percent. The reported national inflation rate for October (4.8 annual rate) was even better news (CBS Radio News, 11/24/81). Interest rates are also declining. On October 30 (CBS Radio News), the Federal Reserve Board (the Fed) announced that it was reducing the discount rate, the rate charged member banks for funds borrowed from the Fed, from 14 to 13 percent. On November 16, the Fed voted to remove the two percentage point penalty it charged member banks for borrowing from the Fed too frequently (Rocky Mountain News, November 17, 1981, pg. 7-13). On November 12 (CBS Radio News), Chase Manhattan and First National of Chicago lowered their prime interest rates to 16.5 percent. On November 16, most major banks followed Chase and First National and lowered their prime rates to 16.5 percent (Rocky Mountain News, November 17, 1981, pg. 4-13). One bank (Crocker National Bank, the nation's 12th largest) cut its prime rate to 16 percent (ibid.). Most analysts expect a 15 percent prime rate by Christmas (USNWR, November 16, 1981, pg. 65). Unfortunately, even that very good news is tainted. The improved interest rate and inflation picture is the result of the current recession and slack demand, rather than increased output and improving money market conditions. With the likelihood of expanded government borrowing to finance bigger than expected deficits, the continuation of declining trends in inflation and interest rates is uncertain.

Although not as severely impacted by the nation's economic blues as many other states, Wyoming has not gone unscathed either. Tourism (Table 3) is an area which is sensitive to national economic conditions. While travel, as indicated by park visits and traffic counts, is up substantially from a year ago, expenditures, as indicated by lodging's sales tax collections and some research in progress at IPR, is down from past third quarters. Residential construction (Table 7) is also down from the previous three third quarters. The fact that 3/81 (third quarter, 1981) residential construction value is lower than 3/78, 3/79, and 3/80 is particularly significant, in light of the substantial inflation evident in the housing sector. That residential construction activity could decline in a state whose population has grown 41 percent from 1970 to 1980 (1980 Census of Population) is perhaps the most revealing indication of how difficult it has been for people to purchase a home. New car and truck registrations (Table 9) continue to slide downward as well. Every year's third quarter since 1978 has shown a further decline in new car and truck registrations. Miner's weekly earnings (Table 4) are also down slightly from 2/81, largely due to a shorter work week. It is possible that the shorter workweek is due in part to resumption of production in union coal mines, mostly in the eastern U.S. The end of the strike may have removed some of the spot markets for Wyoming coal. New 2/81 data just released in U.S. Department of Commerce News (November 8, 1981, pg. 4) indicate some other problems in Wyoming's economy. Nonfarm personal income grew only 0.5 percent during 2/81, third worst in the nation. Wyoming bested only West Virginia and Kentucky, states where the coal strike was a major factor.

Despite showing some symptoms of the nation's economic troubles, Wyoming's economic outlook is much better than the nation's. The state's energy producing industries continue to lead the way. Higher oil prices have prompted a surge in exploration effort. Well drilling in Wyoming during the first week in November, 1981 was up nearly four-fold (USNWR, November 16, 1981, pg. 13) from the same week ten years ago. The Oil and Gas Journal (September 28, 1981, pg. 173) estimates that of 147 oil-burning power plants with practical conversion potential, conversion is likely in 54, and conversion is already underway in another 40. Conversion of all 94 would boost demand for coal by 33 million tons per year.

Wyoming's uranium industry got a much-needed lift from the Reagan Administration. The Reagan four-point proposal (Time, October 26, 1981 pgs. 18-20) calls for reprocessing of spent fuel, speeding up of power plant licensing procedures, standardization of power plant designs, and a joint government-industry effort to develop safe methods of waste disposal. The Reagan plan faces stiff opposition. In the meantime, delays at Diablo Canyon and cancellations of plants in the Pacific Northwest continue to plague the industry.

Wyoming's natural gas output is up substantially (Table 1) for June and July (the most recent data available) over preceding months. The possibility of early decontrol (before 1985) of natural gas prices continues to surface in the news occasionally. On November 12, KOWB radio, Laramie, reported that a study by the Citizen-labor Energy Coalition warned of an immediate doubling in prices if decontrol occurred. Senator Bob Dole (R-Kansas) suggested a profits tax coupled with deregulation of natural gas prices, as a means to reduce the government's budget deficit (USNWR, November 16, 1981 pg. 24). According to USNWR (November 23, 1981, pg. 12), one deregulation-plus-windfall-tax proposal being considered would raise $75 billion for the federal treasury over the next four years.

Wyoming and the nation will begin 1981 in a climate ef economic uncertainty. Will Americans have the patience and confidence to ride out the current downturn and wait for the administration's promised strong upturn by mid-1982? Will the Reagan Administration, faced by a flood of red ink, raise taxes? Can inflation and interest rates continue to decline while the federal budget deficit soars? Will election year politics prompt the Congress to push the "panic button" as unemployment approaches 9 percent? Will Americans save or spend their tax cuts? The answers to some of these questions and many others will be formed in the coming months. The eventual outcome of a multitude of economic and political forces depends at least as much on what people expect to happen as on the actual forces themselves. The millions of individual decisions which shape these forces depend on what economic conditions people anticipate.

Some words from leading economist, Walter Hoadley provide a useful foundation from which to initiate action (USNWR, November 23, 1981, pg. 50). "The whole Reagan program hinges on people reacting to an incentive. Critics are completely overlooking the costs if the program fails." Some of us doubt the program's ability to achieve its stated goals on the basis of its newness; it is an effort based largely on untested economic theory. Others disagree with the means being used to implement the policy, in particular the budget cuts in many social programs. Still others oppose the program for political reasons. Whatever the veiwpoint, failure of the program will be very costly.

WINTER MINERALS OUTLOOK

W. Dan Hausel,
Deputy Director,
Geological Survey of Wyoming

Uranium

The uranium industry continued in its depressed state throughout Wyoming. Nearly 2,500 uranium workers have lost their jobs in Wyoming because of the depressed market. Recent shutdowns of Federal-American Partners uranium mill in the Gas Hills during November, and a sulfuric acid plant in Jeffrey City, operated by Western Nuclear, during October, have added more people to the unemployment lines. The sulfuric acid plant is one of three plants in Jeffrey City that produces the acid as a by-product of uranium milling.

In spite of the depressed market, construction of some small mining operations are reported. Silver King Mines continued development work on Tennessee Valley Authority's Morton Ranch property in the southern Powder River Basin. Silver King is presently completing the construction of a second shaft on TVA's property that initially was started by United Nuclear Corporation. Plans call for the completion by 1984 of underground mine workings, open pit mines, and a 1,500 tons-per-day mill. Mine operations will depend on a uranium market recovery.

Another mine is planned by Uranium Resources Incorporated (a Texas company) near Douglas, Wyoming. This in situ mine will be developed as a test pilot plant. Full scale mine operations will begin, if the tests are favorable and if the uranium market turns around.

The Reagan administration recently supported the industry by calling for faster licensing of nuclear power plants and breeder reactor development, lifted a ban on commercial recycling of spent fuel, and urged development of atomic waste disposal.

Recent discussions about reclaiming open pit uranium mines while mine operations are suspended (until the market improves) have the uranium industry concerned. The backfilling of inactive uranium mines would essentially dilute the ore grade by requiring the remining of waste material to recover the ore. The industry suggests that this would escalate their costs to the point that these reclaimed mines would be uneconomic, even with a substantial turnaround in the market. Proponents of reclamation claims that the industry may never return to their mines and foresee no uranium market improvement for several decades, and therefore suggest that the uranium companies should be required to reclaim their mining operations within the near future.

Sulfur (fertilizer)

Chevron USA is considering constructing a 1000 tons-per-day fertilizer plant at Rock Springs. The plant, if built, will utilize sulfur from the company's gas sweetening plant in Uinta County and phosphate from a Vernal, Utah, mine. The plant is expected to employ 1500 workers during construction, and 350 to 700 workers during operation.

Other places being considered for the construction of the plant include Vernal, Utah, and Kemmerer, Wyoming.

Diamonds

The Geological Survey of Wyoming announced its intentions of continuing to search for diamond-bearing kimberlite in Wyoming. The Survey recently received a $7200 grant from the University of Wyoming Mining and Mineral Resource and Research Institute to conduct stream sediment sampling in the Laramie Range,and to process kimberlite rock for diamond occurrences. During the last two years, the State Geological Survey's kimberlite exploration program [illegible] partially funded by a grant from the U.S. Office of Surface Mining. Under the OSM grant, two new kimberlites were discovered and numerous stream sediment samples showed positive traces of kimberlite. The Survey intends to follow up on these positive samples, in hopes of finding additional kimberlite rock bodies.

Oil and Gas

by Alan J. VerPloeg, Staff Oil & Gas Geologist, Geological Survey of Wyoming

Brent Exploration Inc., an American subsidiary of Brent Petroleum Energy of Calgary, Canada, recently announced an indicated discovery approximately 15 miles northeast of Greybull, Wyoming, in the Bighorn Basin. The structure in question may hold as much as 900 million barrels of oil, according to a company spokesman. However, there is one major problem, and that is getting the extremely heavy oil out of the Phosphoria Formation from a shallow depth of 1500-2000 feet. Pressure in the wells is abnormally low, and that, along with the heavy nature of the oil, will require expensive tertiary methods, such as steam or hot water injection, to remove the oil. How successful Brent Exploration will be in removing the oil remains to be seen, as similar finds in the area in the past have met with little success.

On the eastern edge of the Overthrust Belt, Exxon Corporation has opened a new field and completed a deeper pool discovery in Dry Pine Field. The new field discovery (1 Lake Ridge Unit) was completed in the Mississippian Madison, flowing 6.1 million cubic feet of high CO_2 gas per day. The deeper pool discovery in Dry Piney Field (1 Graphite) was completed from the Mississippian Madison, flowing 5.0 million cubic feet of high CO_2 gas per day. The gas from both wells contains between 3.1 and 6.5 percent hydrogen sulfide and, as a result of the large amount of CO_2, is relatively low BTU gas. These two discoveries are only a few miles south of American Quasar's Riley Ridge Field discovery, which produces gas from the Madison and Bighorn, and is similar in composition to the Exxon discoveries. As a result of these gas finds, Northwest Pipeline is planning construction of a $330 million facility in the LaBarge area that will upgrade the low BTU gas and remove the hydrogen sulfide. Upon completion, the plant should have a capacity of 400 million cubic feet of gas per day.

Results of a recent joint federal-state mineral royalty audit indicate $7.85 million in unpaid royalties on Wyoming leases by 11 oil companies. State Auditor James Griffith indicated the auditors discovered royalty underpayments for 17 of the 20 audited properties. However, he emphasized that the problem areas were investigated first, and that these results would not be any indication of overall delinquency in the state. The state is entitled to 50 percent of the delinquent royalties, less the windfall profits tax from the total.

In a related note, the price of entering the federal oil and gas lottery is slated to rise to $75 in January 1982, a rise of $65 from the $10 charged as recently as last September. In addition, rental charges may be raised from $1 per acre, which is currently charged for the entire 10-year lease term, to $3 per acre in the second half of the lease term.

Coal

by Gary B. Glass, State Geologist, Geological Survey of Wyoming

There are some signs that Wyoming's coal activity is accelerating a little. In the final quarter of 1981, two companies applied for strip mining permits; a coal-slurry company began negotations for surface waters in South Dakota; a company planning a coal-to-gasoline plant and a mining company planning a surface coal mine applied for Industrial Siting permits; and the Bureau of Land Management held a major federal coal lease sale in southern Wyoming.

The new or resubmitted strip mining applications were for WYMO Fuel's WYMO mine and Shell Oil's North Rochelle mine. WYMO Fuels, which is a subsidiary of Kansas City Power and Light Company, has resubmitted its application for a new strip mine in southern Campbell County. An earlier application stated that WYMO planned to mine its estimated 42 million tons of coal at an annual rate of four million tons-per-year. An actual construction schedule, however, has not been announced.

Shell's North Rochelle strip mine application is a new filing. This mine is also planned for southern Campbell County, where Shell has an estimated 197 million tons of recoverable coal that it hopes to mine over a 26 year period. Shell hopes to begin shipping coal from North Rochelle by 1985. Although maximum annual production will be designed for eight million tons, that level isn't expected until the later 1980s.

In a relatively unanticipated action, South Dakota's governor, Bill Janklow, and Energy Transportation System, Inc. (ETSI) announced a tentative agreement for ETSI to purchase up to 50,000 acre-feet of water each year from the Oahe Reservoir. Governor Janklow convened a special session of the South Dakota Legislature, which quickly approved the tentative plan. The two parties have begun a series of meetings to iron out details. Various special interest and citizen groups have voiced reservations, if not opposition, to the proposal, and Nebraska has already threatened to file suit if the agreement is signed.

Hampshire Energy, a consortium consisting of Northwestern Mutual Life Insurance Company, Kaneb Services, Inc., Koppers Company, Inc., Metropolitan Life Insurance Company, and Standard Oil of Ohio, has formally applied to the Wyoming Industrial Siting Administration for its proposed coal-to-gasoline plant. The facility will produce about

19,000 barrels of unleaded gasoline per day, as well as some propane, butanes, ammonia, sulfur, and carbon dioxide. The plant site is approximately 10 miles southeast of Gillette, in Campbell County.

The products will be produced by gasifying coal, converting the coal gas into methanol, and then converting the methanol into gasoline. Hampshire hopes to begin initial construction in April 1982, with completion by late 1985.

In a somewhat related matter, Rochelle Coal Company has applied for an Industrial Siting Permit for its proposed Rochelle strip mine in southern Campbell County. This $116.5 million coal mine is planned as the supplier to Panhandle Eastern's coal gasification plant, which only last quarter was again postponed. Rochelle Coal Company, a joint venture of subsidaries of Peabody Coal Company and Panhandle Eastern Pipeline Company, will seek other markets if Panhandle's gasification plant is not built. The mine property has an estimated 411.5 million tons of recoverable coal and is planned for an 11 million ton-per-year capacity.

On October 28th, the U.S. Bureau of Land Management offered its second federal coal lease sale in Wyoming. In this sale, a small (360-acre) emergency tract was awarded to Big Horn Coal Company near Sheridan, Wyoming, for a bonus bid of $25.00 per acre. A 5,974.09 acre parcel, the China Butte Tract, was opened to oral bidding and awarded to a local landowner, Taylor Lawrence. The bonus bid on this tract in Carbon County, southwest of Rawlins, was about $1,792,300, or $300 per acre. Lawrence bid against Arkland Company, which dropped out of the bidding at $295 per acre. The tract contains an estimated 62.7 million tons of recoverable strip coal. Intervening sections owned by Union Pacific's subsidiary, Rocky Mountain Energy, were not included with the tract. In the case of the China Butte Tract, one-fifth of the bonus bid was due immediately, with another one-fifth due each of the next four years.

The Bureau of Land Management may hold another southern Wyoming lease sale later this year or early next year. If the sale is held, it will offer the Red Rim Tract, which is about 10,000 acres in size. This tract is also located southwest of Rawlins, Wyoming.

WINTER AGRICULTURAL OUTLOOK

Robert D. Carver
Extension Economist
University of Wyoming

Pessimism dominates the outlook in nearly all phases of agriculture for the coming year. Prices received by farmers for production goods and services in the fall of 1981 were down 9.2 percent from a year ago. At the same time, prices paid by farmers for input items had risen 6.3 percent above 1980 levels. Livestock prices are depressed, primarily due to declining consumer demand. The dominant factor affecting the slide in grain prices has been the record 1981 U.S. production.

Undoubtedly. with farm production expenses rising faster than cash receipts for the second straight year, many farmers are caught in a cash flow squeeze. Borrowing to cover next year's production costs will be tougher for some producers, since credit availability is affected by the combination of record interest rates, low crop and livestock prices and slower rise in land values. Producers whose credit is already extended may encounter the most problems, but all farm borrowers are paying record charges for money.

Going into 1982, supplies of farm products will continue to be large relative to demand in domestic and world markets. Perhaps the most important variable in the agricultural outlook, barring unexpected weather developments, is the performance of the domestic and world economies. The extent and speed of recovery in world economic conditions will be crucial.

Livestock

U.S. meat output in 1982 will likely reach record levels. Poultry will remain on its upward trend, although the increase will be slower than that of the last few years. Cattle slaughter will increase in 1982, and, with cattle feeding picking up this fall in response to large feed grain and oilseed crops, total beef output could increase 3 to 4 percent. Pork production may drop slightly, especially during the first half of 1982. Then, as producers respond to lower feed costs, output may build to above year earlier levels by late 1982.

The cattle and calves inventory on July 1 increased 2 percent from a year ago, a slowdown from the 4 percent pace of 1979 and 1980. Heifers saved for possible beef cow replacements increased 7 percent over last year and 8 percent above 1979 levels. The expected 1981 calf crop is only 1 percent larger than a year earlier, as the extended drought and hot temperatures in the summer of 1980 apparently reduced conception rates.

Cattle slaughter is expected to increase by about 3 percent in 1981. Cow slaughter is expected to remain slightly above the 13.2 percent of the January 1 cow herd during 1981. This proportion is well below the 16 to 17 percent required for herd stability and much less then required for herd liquidation. The cattle herd on January 1, 1982, is expected to increase by 2 to 3 percent to about 118 head. The rate of herd expansion has slowed, but expansion is expected to continue over the next couple of years, unless a sharp reversal in forage suppliers occurs.

Feeder cattle moved at a slow pace throughout much of the fall. With generally good range conditions and increased hay production during 1981, many cow-calf producers have apparently elected to hold 1981 calves until spring. This restricted movement may help support feeder cattle prices as we move into winter; however, if large numbers of yearlings are marketed next spring, prices may then be under pressure.

Grain & Feeds

Corn production for 1981 was estimated at 8.1 billion bushels. This estimate by the Statistical Reporting Service indicates a new record, exceeding the 7.939 billion bushels harvested in 1979, and well above the 6,648 billion bushel crop of 1980. Production of the four major U.S. feed grains (corn, sorghum, oats, and barley) was estimated at a record 245.3 million metric tons, nearly 3 percent above the previous high in 1979.

U.S. wheat producers harvested a record 2.75 billion bushels. This will result in an increase in carry-over stocks, despite the prospects of huge Soviet imports. Larger supplies and reduced prices will result in greater domestic wheat feeding and thus higher total domestic use.

The western and plain states produced a hay crop nearly 11 percent larger than 1980's drought reduced crop. Although hay production is larger in 1981, carry-over supplies were substantially lower than in 1980. Thus, hay supplies do not differ much from those a year ago in many parts of the West. If severe weather results in widespread needs for winter feed, hay supplies may not be adequate.

Prospects

Grain producers are not likely to see grain prices increase beyond carrying charges before spring. Prices will be sensitive to developments in the export markets and southern hemisphere crops. Some price strength could develop in late spring or early summer if U.S. and world economies improve.

Prices for feeder cattle in the fall of 1982 will likely mirror fall 1981 prices. Some price strength could appear in March and April due to pasture demand. However, there is only a 30-40 percent probability that prices will advance enough to cover wintering charges. On balance, 1982 looks like another belt-tightening year for livestock producers.

Business Conditions

Neil H. Royce, Manager
Cheyenne Credit Bureau

Outlook for Borrowing

Borrowing money for both individual and business purposes has become more and more a scientific process. The days of going to your local bank, with which you had a line of credit, has basically ceased. Due to the recent changes in our laws, many of the "full services" formerly offered only by the banking industry can now be offered by savings and loan institutions, federal credit unions, and commercial finance companies. In fact, some of our largest department stores (e.g., Sears) are now offering many of these services.

We now see savings and loan institutions, finance companies, and credit unions offering Visa and Mastercard. Most institutions have set a minimum loan value, some as high as $5,000, virtually eliminating the signature type loan. These minimums are necessary because of the high cost of processing and supervision of all transactions.

The overall outlook for borrowing still remains tight, and many forecast a "hold" until after the second quarter of 1982. Many factors have an affect on the borrowing picture, such as the high cost of interest (although we're now seeing some softening there). Many lenders are in a hold situation, waiting until their high interest money market certificates mature in the second quarter of 1982. Bankers, watching the results of "Reaganomics," have only had two months of implementation upon which to base their decisions. Consumers also still lack confidence in the Reagan plan, and for now are playing a "wait and see" game before deciding whether to deposit their money in savings or to spend it on retail purchases.

A recent poll, taken for the Survey Research Center of the U.S. Chamber of Commerce, found consumer confidence at a low level. Fifty-five percent said it was a bad time to buy major items for the home, and 81 percent thought it a bad time to buy a home.

From the latest indicators, we have seen a very definite slow down of borrowing and spending in the Rocky Mountain and Wyoming areas in the last 30 to 60 days. Auto sales have not responded to this year's new auto promotions, although used cars remain strong. Home mortgages have decreased 50 to 60 percent, and, in some areas with mine closings, more than 60 percent. Retail sales have remained level during a time when we should be seeing a marked increase because of Fall and Christmas sales.

Reaction to High Interest Rates

Consumers have reacted in various ways, investing in high yield monthly market certificates, taking advantage of the "All Savers Certificates," and selling, as opposed to buying, stocks. The primary reaction, however, has been to not put money into regular savings. Such money is badly needed by lending agencies, which provide loans to private enterprise for growth and expansion.

High interest, as well as high cost, has greatly curtailed the purchasing of automobiles and new homes. New home sales affect our economy more so than automobiles. They produce a "domino" effect, reaching everyone, from the real estate salesman to the person selling sod for the front lawn. High interest now charged by retailers and credit issuers has also been a factor in consumer decisions to purchase nondurable or durable goods.

According to the Federal Reserve Board, maturities on new car loans at commercial banks continued to lengthen in the May-August 1981 period. About 1.0 percent fewer borrowers entered into contracts of 30 months or less, another 1.0 percent fewer took loans for 31-36 months, and 68.4 percent of the borrowers contracted for repayment in more than 36 months. Lengthened maturities in recent years are a contributing factor to declining car sales both this year and last year. The average age of a car on the street is now 6.5 years.

Business Conditions in General

Wyoming and most of the Rocky Mountain area in general have weathered the recession of the past three years very well. We can see no changes which would be different for this late-1981 recession.

Looking at the decline of long-term interest rates, business-fixed investments will be seen in early 1982. Forecasts call for housing starts to be 1.6 million units next year and 2 million in 1983. Releasing of Wyoming Community Development Authority monies will put Wyoming's starts ahead of the nation's in percentage. Lowering of the prime rate (there are some forecasts indicating it will be as low as 10 percent in 1983) will help both the auto industry and home building. Inflation and interest rates climb or fall in a direct ratio. With the decline of prime rates, now at 17 percent, inflation rates should also decline.

"POSSIBLE DREAM?"

Matilda Hansen
State Representative (D.-Albany)

Stop inflation--Increase military spending...Balance the budget--Decrease taxes for the rich...Shift priorities--Spending cuts make no basic changes...Flexibility--Program mandates...Cut the supply of human service dollars--Demand for human services decreases...Changes in Federal dollar allocations--State budgets pick up the slack...Revenue enhancers needed--no tax increases....

These ideas represent the current rhetoric on federal budget policies. From the viewpoint of state budget assessments and implementations, are the current discussions close to dreaming the impossible dream?

This fall, Congress is attempting to cut $763 million from Labor/Health and Human Services Appropriation, to reduce inflation and high interest rates. The total effort is to cut an additional $12-15 billion from FY '81 spending; reductions in addition to the $35.2 billion achieved in congressional work in the summer of 1981.

Fiscal year '82 began October 1, 1981. Temporary spending authorization was given through November 20. Intense debate ensued on 4 percent reductions in all nonmilitary nonentitlement programs versus 2 percent cuts on all but entitlements. The 2 percent cut in military spending stayed in effect only until the major military bill passed a few weeks later. President Reagan wanted to postpone appropriations decisions until January 1982, four months into the fiscal year.

In order to keep a handle on federal spending, the Treasury Department directed that state shares of federal dollars, sent to each state each month, be 1/12th of the fiscal year's appropriation. But 1/12th of what? Final FY '82 appropriations may take until April 1 to establish, six months into the fiscal year.

States establish spending levels for programs such as Medicaid based on census data. At the request of Pennsylvania and West Virginia, the Solicitor General ruled that, for FY '82, the 1980 census shall be used. County by county census data showing degree and number of people at or below poverty will be available to the states about June 15, 1982.

Part of the rationale for block grants is to allow the states more flexibility. "The states are in charge." Unless otherwise stated, all block grants must be in place in each state by October 1, 1982. If a state fails to get these blocks in place, the federal department will, in some instances, administer funds directly to local programs. Other programs will cease in that state.

In the Alcohol, Drug Abuse, and Mental Health Block for FY '82, all states are required to divided all block grants funds between mental health programs and the alcohol/drug abuse programs by the same proportion as in FY '80. In FY '83, 95 percent of the funds are to be so divided, and in FY '84, 85 percent of the funds so divided. Of the drug and alcohol abuse dollars, at least 35 percent shall go to alcohol abuse programs, 35 percent to drug abuse programs, and 20 percent to prevention programs. This is called having the states in charge.

In the appropriations battles in November for the Community Services Block, which includes Community Action, Senior Opportunities and Services, Community Food and Nutrition, and Energy Conservation, the administration wants a 40 percent reduction over FY '81 spending.

Title XX and Low Income Energy Assistance Block grants went into effect October 1, 1981. The Department of Health and Human Services ruled that if these were not in place, the states would lose all funding for these programs. The rules and regulations for these programs were not out of the Budget Office with their final clearance until September 30, 1981. The states and Health and Human Services are interpreting the law differently.

The July tax cut package means a $750 billion decrease in revenue over the next five years; far deeper cuts than many realized. This is partly due to the new accounting practice now possible for corporations. The spending cuts identified as of September 1 for the same five year period are less than one-half the $750 billion. This is why David Stockman took his August trips to California to talk about needed cuts in the military budget, and why President Reagan has begun to talk about revenue enhancers.

With all the percentage cuts and dollar amounts being discussed, there is little discussion about program design or determining needs. In budget discussions, beginning in March of 1980, the implied suggested solutions included:

1. The problem will go away--people will not be poor, sick, handicapped; or
2. The states will pick up the funding; or
3. Private payers will pick up the slack; or
4. Service providers will eat the difference; or
5. If we cease to fund human service programs, the demand will cease.

The application of supply side economics is described as the "whole new way, whole new tack in addressing our economic policy". Is supply-side economics new? It originated with French classical economics of the early 19th century, and was expressed most eloquently by Jean Baptiste Say; "Supply creates its own demand". Low taxes, private sector care for the needy, and no inflation are the goals of supply side economists.

Can private philanthropy care for the poor and needy? A Catholic woman in Laramie says she is giving more this year to her church because of the increasing need for social services. Are the rest of us increasing our United Fund and other charitable contributions? Historically, private sector charity was the local rich with a guilt complex. Will the multinational consortiums feed the hungry or buy health care?

President Reagan and his people explain the census' identified growth in social programs as evidence of the need for Congress to limit eligibility and amounts of individual benefits and the expansion of these programs into the lower reaches of the middle class. Others say the census data shows the benefits go to more of the poorest households. In times of recession and high unemployment, more people are poor. For each 1 percent rise in unemployment, the federal deficit increases by $25 billion, because of more unemployment checks, food stamps and, more importantly, unpaid taxes.

In addition, the poor get sick. Health care providers will be under extreme pressure to give assistance even though payment may not be forthcoming. Changes in Medicare and Medicaid rules are eliminating many people from the rolls. Will doctors, druggists, and hospitals care for the sick as they used to before World War II, when uncollected bills were often the biggest part of a doctor's estate rather than Medicaid checks accumulating security for the doctor's family?

Where are the states in all this? They are caught in the middle!

A federal judge in Philadelphia issued a permanent injunction on November 20 against all new regulations governing Aid to Families with Dependent Children, thus blocking reductions in benefits to the nation's largest group of needy, children. With funding required according to the old regulations and appropriations at an unknown level, the states are required to pay the total bill.

Until state administrators know what the decisions in Washington are, they will be unable to make recommendations to the Legislature. Wyoming administrators in Title XX programs made three different budgets during September, October and November, each thought to the be final one.

David Stockman was right in October when he said the administration needed some mid-course direction, that the problems were more complicated.

By mid-November, efforts at midcourse direction were coming from two directions: from the federal courts, as described above, and from the Congress, in the difficult task of setting appropriations levels. Amid much fanfare in May, June and July, budget decisions were made, reducing spending in some areas for FY '81 and setting goals for the entire budget for FY '82, '83, '84. Allocating or denying dollars to specific programs is quite different from setting goals. The President wants deeper and deeper cuts in social programs in succeeding years. Many in Congress are resisting. Who will prevail?

Fortunately for Wyoming, we do have fiscal resources that can be allocated to programs the Congress cuts. Wyoming can afford anything the legislators perceive as desirable. Some say we should not fund anything Congress cuts. Others say "Let's be selective". No one is saying we should automatically fund anything Congress cuts.

The new year and the budget session are upon us. Budgets for state agencies are now in the state budget office, being prepared for the governor. Many of these budget projections can not even carry the label "wild-eyed-guess". There are still too many unknowns. Yet the states are responsible to the people. The states are closer to the people. The Legislatures are being given the task to tell the public just how Congressional budget cuts affect the home-town folks. Legislators will take the heat for Congressional decisions.

We are living in a nightmare of high interest rates and recession. We all share deep concern for our nation and our economy, but supply side economics is dreaming the impossible dream.

SOCIAL SECURITY SURVEY RESULTS
PERCENTAGE OF RESPONDANTS IN FAVOR OF THE ALTERNATIVES
LISTED BY AGE GROUP

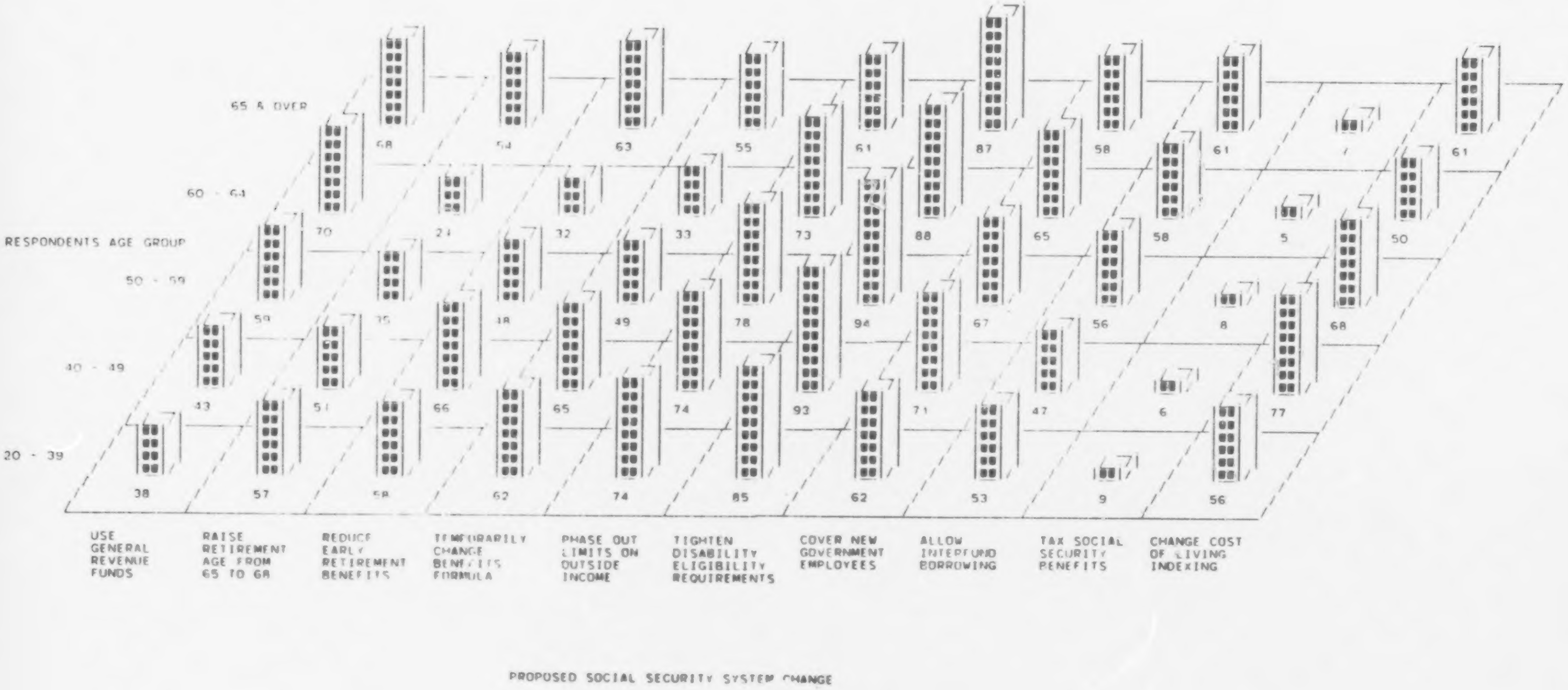

Figure 1: Energy and Mineral Production

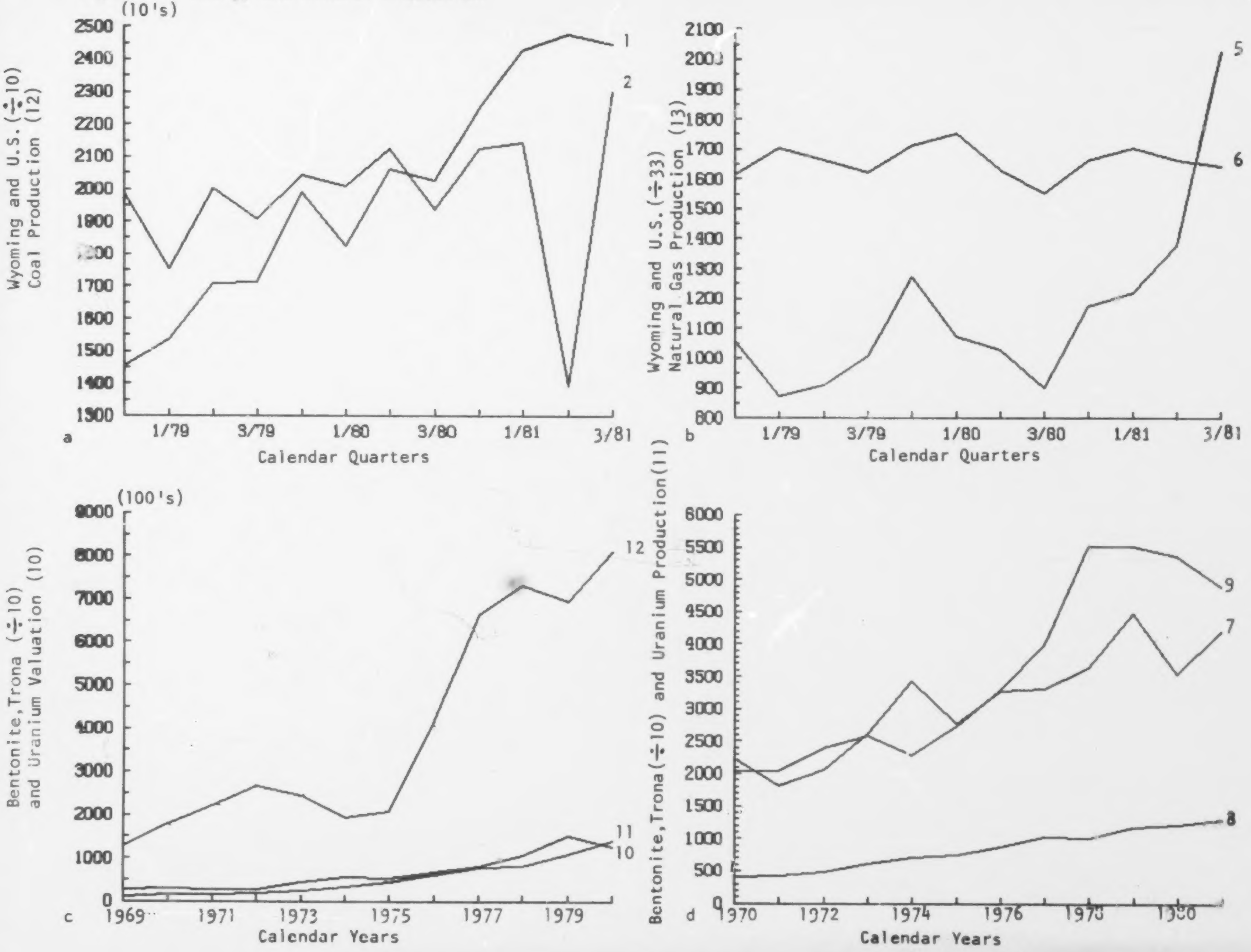

Table 1: Energy and Mineral Production[1]

Calendar Quarters	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81
1. Wyoming Coal (12)	14556.	15349.	17073.	17119.	19897.	18249.	20630.	20297.	22505.	24312.	24976.	24495.
2. U.S. Coal (12)	198695.	175608.	200109.	190780.	204300.	200763.	212651.	193760.	212575.	214400.	139510.	230205.
3. Wyoming Oil (14)	369.	360.	357.	328.	313.	346.	349.[2]	354.	353.	351.	364.[2]	374.
4. U.S. Oil (14)	8739.	8543.	8500.	8495.	8600.	9676	9629.[2]	8565.	8638.	8570.	8526.[2]	8521
5. Wyoming Natural Gas (13)	1057.	874.	911.	1006.	1273.	1071.	1028.	901.	1174.	1219.	1378.	2023.[5]
6. U.S. Natural Gas (13)	53825.	56830.	55382.	54114.	57087.	58381.	54300.	51777.	55344.	56740.	55356.	54736.[5]

Calendar Years[3]	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
7. Bentonite (11)	2228978.	1813066.	2062384.	2614779.	3422635.	2760871.	3278765.	3315783.	3626652.	4479242.	3534713.	4200000.[4]
8. Trona (11)	4022304.	4203677.	4783946.	6029984.	7070617.	7379792.	8800607.	10215602.	9974237.	11771985.	12159241.	12800000.[4]
9. Uranium (11)	2042074.	2044943.	2390100.	2588011.	2287697.	2736663.	3302422.	3986025.	5517070.	5512345.	5352337.	4900000.[4]
10. Bentonite Valuation[6] (10)	28977	INA	27501	44175	56485	53333	67520	79508	105518	157687	124861	INA
11. Trona Valuation[6] (10)	148306	INA	171273	227933	335379	442787	616042	786601	797939	1088909	1389255	INA
12. Uranium Valuation[6] (10)	177971	INA	267347	244697	194193	208297	418301	662409	731965	692904	809810	INA

After nine quarters of virtually continuous growth, the amount of coal produced in Wyoming seems to be leveling off (Figure 1a). Production in 3/81 is up only 0.75% over 1/81. By comparison, production in 3/80 was 11.22% higher than 1/80 production. The resumption of production in union coal mines, and thus the loss of some spot markets for Wyoming coal, may have contributed to the unusually slow expansion in coal output over the past few months. Still, 3/81 production is up 20.7% over 3/80.

U.S. coal production in 3/81 made a big comeback after the strike depressed second quarter (Figure 1a). Figures for 3/81 indicate an 18.8% increase over 3/80 production. Indeed, 3/81 production may well be higher than normal in an effort to replenish inventory depleted during the coal miners strike.

Wyoming oil production during 3/81 shows a moderate increase of 2.75% over 2/81 and a 5.65% increase over 3/80. These increases are largely due to Overthrust Belt production coming on line. Meanwhile, U.S. production continues its gradual decline in 3/81; down 0.06% from 2/81 and down 0.52% from 3/80.

Based on July production figures, 3/81 production of natural gas in Wyoming will be substantially higher (124.5%) than in 3/80 (Figure 1b). U.S. production shows a lesser increase of 0.57% during the same period. While Wyoming production was 46.8% higher in 3/81 than in 2/81, U.S. production actually decreased by 0.11%.

After losing ground in 1980, bentonite production is forecast to increase in 1981. The Wyoming Department of Economic Planning and Development (DEPAD) projections indicate a 26.7% increase in production for 1981 over 1980, (Figure 1d). Trona production has recorded an increase in all but one of the past eleven years, and DEPAD forecasters do not anticipate any change in the trend. Production for 1981 is projected to be up 5.27% over 1980 (Figure 1d). Uranium production is forecast by DEPAD to be down for the third consecutive year. Production for 1981 is expected to be 9.23% below 1980 levels.

The valuation of taxable mineral production in Wyoming is increasing even more rapidly than is production. 1980 trona production was up 3.29% over 1979, but the valuation was up 28.4%. From 1979 to 1980, uranium production actually declined, but the valuation of production increased 16.87%. Only bentonite, for which production declined by 21.1% from 1979 to 1980, had a decline in valuation of production during this period (figure 1c).

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[1] First time readers of WQU should refer to the last page ("Format") for an explanation of numerical codes and table formats.
[2] Datum shown is an estimate. Some data components were not received.
[3] Following data do not include state and federal lands production. Taxable production only is shown.
[4] 1981 production projected by the Department of Economic Planning and Development.
[5] Preliminary. Only July's produdction data were available.
[6] Valuations are shown for the year of production upon which they are based, i.e. 1981 valuations are listed under 1980 because they are based on 1980 production.

Figure 2: Agriculture

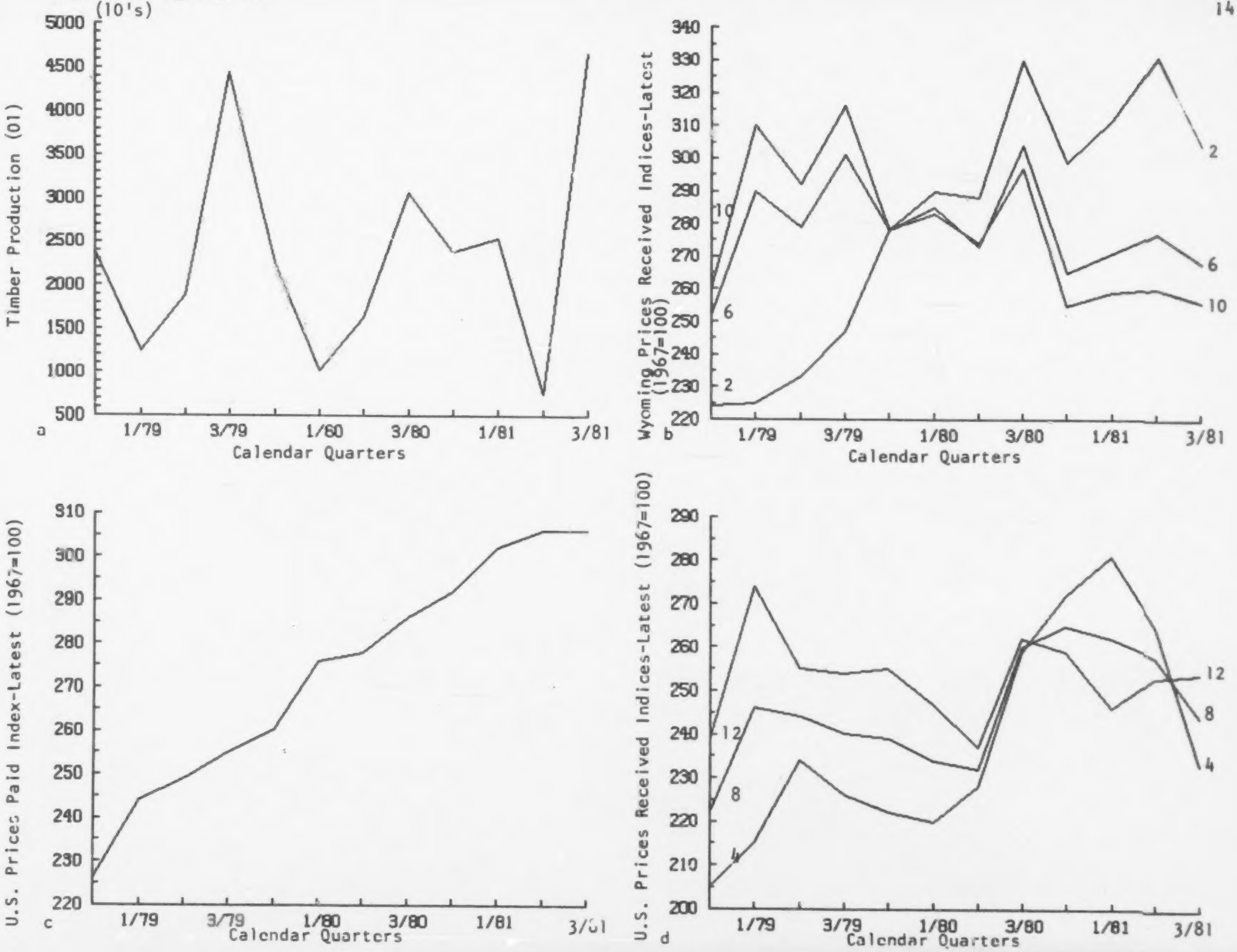

TABLE 2: Agriculture

Calendar Quarters	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81
1. Timber Cut in Wyoming National Forests (01)	23827.	12444.	18858.	44418.	22548.	10164.	16332.	30556.	23898.	25478.	7481.	46636.
Price Indices[1] (1967=100)												
2. Wyoming Crops, Prices Received - Latest	224.	225.	233.	247.	278.	290.	288.	330.	299.	312.	331.	304.
3. Wyoming Crops, Prices Received - Average	214.	218.	224.	246.	259.	279.	282.	308.	292.	315.	322.	302.
4. U.S. Crops, Prices Received - Latest	205.	215.	234.	226.	222.	220.	228.	259.	272.	281.	265.	233.
5. U.S. Crops, Prices Received - Average.	203.	213.	222.	233.	224.	221.	223.	251.	267.	278.	272.	249.
6. Wyoming All Commodities, Prices Received - Latest	252.	290.	279.	301.	278.	285.	273.	304.	265.	271.	277.	268.
7. Wyoming, All Commodities, Prices Received - Average	251.	278.	293.	284.	281.	281.	273.	285.	274.	269.	277.	265.
8. U.S., All Commodities, Prices Received - Latest	222.	246.	244.	240.	239.	234.	232.	260.	265.	262.	258.	244.
9. U.S., All Commodities, Prices Received - Average	219.	240.	245.	241.	238.	237.	229.	255.	263.	263.	260.	251.
10. Wyoming Livestock, Prices Received - Latest	260.	310.	292.	316.	278.	283.	274.	297.	255.	259.	260.	256.
11. Wyoming Livestock, Prices Received - Average	262.	296.	314.	295.	288.	282.	272.	282.	269.	255.	264.	254.
12. U.S. Livestock, Prices Received - Latest	239.	274.	255.	254.	255.	247.	237.	262.	259.	246.	253.	254.
13. U.S. Livestock, Prices Received - Average	234.	264.	266.	248.	251.	251.	234.	259.	261.	250.	250.	254.
14. Prices Paid by U.S. Farmers - Latest	226.	244.	249.	255.	260.	276.	278.	286.	292.	302.	306.	306.
15. Prices Paid by U.S. Farmers - Average	225.	239.	248.	253.	258.	273.	276.	284.	291.	300.	305	306.

The Wyoming all commodities index was again higher than the U.S. index during 3/81. There was a 3.24% drop, however, in the Wyoming indexes since 2/81. Nonetheless, the Wyoming all commodities index continues to exceed that of the U.S. Wyoming livestock prices decreased by 1.5% since 2/81, and by 13.8% since 3/80. Production costs (U.S. prices paid index) rose by 7%, and the Wyoming CPI rose by 10.6%.

Timber production grew by 523% since 2/81, reflective of the seasonality of timber cutting; consistently more timber is cut during the third quarter of the year. The Forest Service has established a policy whereby timber is cut at approximately the same rate as timber growth. Therefore, once the harvesting plan is established, little long-run variability is observed.

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[1] The index for the last month (latest) of each quarter, along with the average of the three monthly indices of each quarter.

Figure 3: Tourism

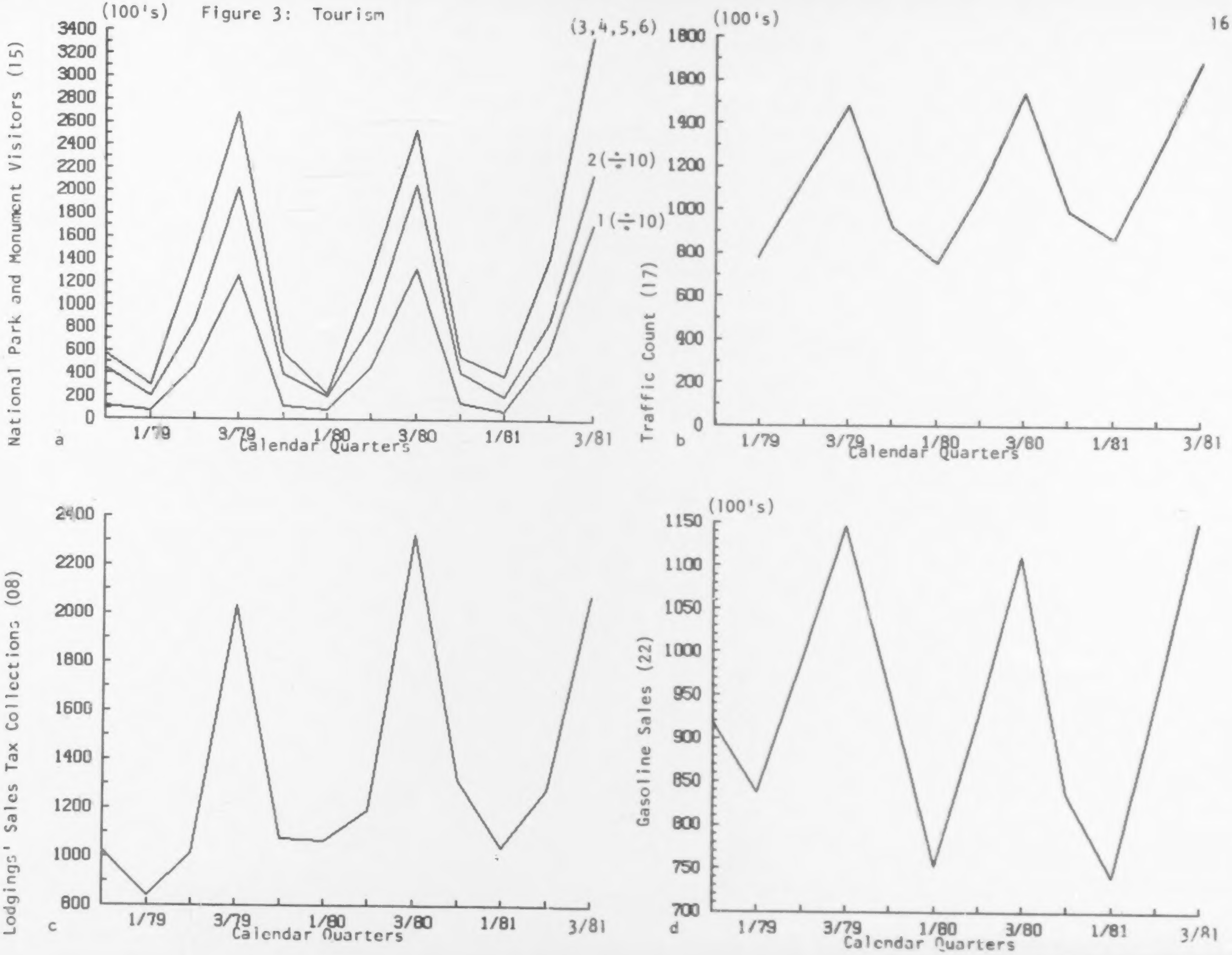

TABLE Table 3: Tourism

Calendar Quarters	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81
National Parks and Monuments												
1. Yellowstone (15)	113152.	73925.	458095.	1251088.	112061.	89609.	459974.	1323837.	144039.	74693.	609642.	1715175.
2. Grand Teton (15)	449882.	199191.	854618.	2023084.	389457.	205415.	814813.	2055989.	412817.	206147.	847464.	2147775.
3. Devil's Tower (15)	12032.	8499.	64754.	140701.	12606.	7600.	51992.	144042.	12346.	13425.	63064.	205660.
4. Fossil Butte (15)	1536.	78.	3612.	8984.	1404.	91.	2864.	6857.	1421.	339.	3795.	7769.
5. Fort Laramie (15)	6929.	5294.	29733.	64685.	7236.	3630.	27621.	52608.	6337.	6309.	40192.	64598.
6. Bighorn[1] NRA-South (15)	36644.	16433.	44483.	54125.	37334.	10554.	45481.	49499.	35422.	18509.	34846.	56566.
7. Flaming[1] Gorge-North (23)	10287.	1219.	43073.	65257.	12653.	1501.	52901.	80272.	13348.	1583.	55890.	84681.
Other Tourism Indicators												
8. Traffic Count (17)	INA.	79446.	115056.	147903.	92168.	75203.	109530.	154224.	99772.	86957.	125992.	168665.[2]
9. Hotel, Motel, and Camp Sales Tax (8)	1025.	839.	1015.	2031.	1074.	1064.	1189.	2326.	1315.	1036.	1272.	2073.
10. Gasoline Sales (22)	91788.	83787.	98986.	114513.	95742.	75338.	92212.	111005.	83626.	74028.	93721.	114971.[2]

The preliminary indications of an unusally busy 3rd quarter reported in the last edition of WQU are confirmed by the figures in this table. Visits to Yellowstone and Grand Teton National Parks in 3/81 were up 29.6% and 4.5% respectively from 3/80. Visits to the other attractions (Series 3-7) were also up significantly over the same period (3/80) a year ago.

Consistent with the visitation data are the gasoline sales and traffic counter data; up 3.6% and 9.4% respectively over 3/80. Despite the substantial increase in the number of visitors to Wyoming's top attractions, sales tax collections from hotel, motel, and campground operators in 3/81 are up only 2.1% (if not adjusted for inflation) over 3/79 and down 10.9% from 3/80. If the U.S. CPI (see Table 9) is used to convert the tax collections into constant dollars, 3/81 receipts are down 18.2% and 19.6% below 3/79 and 3/80 receipts, respectively. Two research projects currently underway at IPR indicate that 3/81 retail sales were also down.

The fact that tourists were not willing to spend at levels near those of prior years is not surprising in light of the national economic conditions reported earlier in this edition of WQU. Despite thinner wallets, it appears that many Americans were still determined to take advantage of this year's lower gasoline prices and plentiful fuel supplies; a combination which they realize might never arise again. The cancellation of travel plans in 1979 because of reduced gasoline supplies and higher prices, and in 1980 because of a recession, probably resulted in a backlog of unfulfilled travel plans, which in turn helped boost tourism this year.

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[1] Flaming Gorge and Big Horn Canyon are both only partially in Wyoming. Only visitation data for the Wyoming parts of each are shown.

[2] Estimated from July and August data.

Figure 4: Employment and Labor

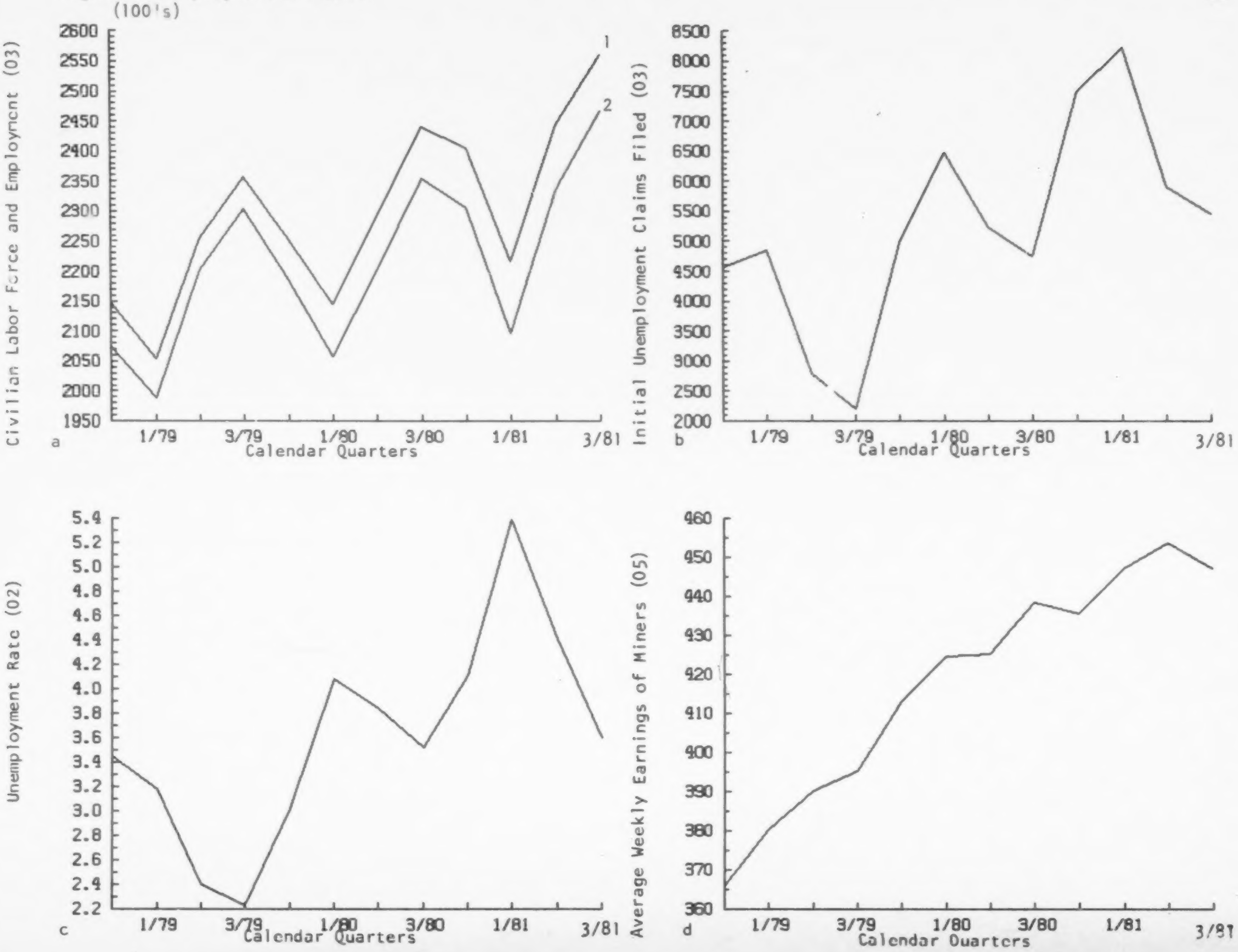

TABLE 4: Employment and Labor[1]

Calendar Quarters	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81
1. Civilian Labor Force (03)	214750.	205450.	225584.	235587.	225379.	214579.	228869.	243987.	240566.	221590.	244466.	255947.
2. Employment (03)	207347.	198922.	220174.	230334.	218571.	205831.	220080.	235404.	230685.	209641.	233690.	246745.
3. Unemployment (03)	7403.	6529.	5411.	5253.	6808.	8748.	8789.	8583.	9881.	11949.	10776.	9202.
4. Unemployment Rate (02)	3.4	3.2	2.4	2.2	3.0	4.1	3.8	3.5	4.1	5.4	4.4	3.6
5. New Unemployment Insurance Claims Filed (03)	4571.	4850.	2790.	2200.	4977.	6466.	5242.	4745.	7494.	8231.	5901.	5463.
6. New Job Applications (03)	8382.	9839.	11653.	10667.	8300.[2]	10263.	12481.	12727.	9584.	13026.	13522.	12383.
7. New Non-Agricultural Openings Posted (03)	8743.	9028.	12210.	13513.	9000.[2]	7126.	9217.	11068.	7526.	6912.	9903.	11649.
8. New Non-Agricultural Job Placements (03)	7656.	7271.	10099.	10655.	8100.[2]	6211.	7848.	9218.	6482.	5649.	7681.	11082.
9. Miner's Average Weekly Hours	44.5	43.4	42.9	43.4	43.7	42.7	42.9	44.1	43.4	43.8	42.8	41.7
10. Miner's Average Weekly Earnings (05)	365.80	380.32	390.12	395.23	413.16	424.77	425.31	438.24	435.56	447.17	453.75	447.02
11. Miner's Average Hourly Wages (05)	8.23	8.77	9.09	9.10	9.45	9.94	9.91	9.93	10.04	10.22	10.61	10.72

The civilian labor force shows an increase in 3rd quarter 1981 of 11,481 persons over second quarter 1981. This continues the expected seasonal trend in the labor force. The labor force recorded a 4.9% increase over 3/80 (Figure 4a). Meanwhile, the number of employed persons also increased during the primary tourist season in Wyoming, the third quarter. During 3/81, 13,055 more persons were working than during the previous quarter. The number of workers employed during this period represents an increase of 4.82% over the same quarter last year (Figure 4a). Put together, the 11,481 person increase in the work force and the 13,055 person increase in employment resulted in a 1,574 person decrease in the ranks of unemployed in Wyoming. The result is that the unemployment rate in Wyoming dropped from an uncharacteristically high 5.4% in first quarter 1981, to 3.6% in the third quarter of 1981. This compares with 3.5% during third quarter 1980 (Figure 4c).

All of the other employment figures show the effects of expected seasonal trends in the same manner as do the labor force, employment, unemployment, and unemployment rate. Third quarter new unemployment claims are down from the second quarter 1981 (but up 15.1% over 3/80), the number of new job applications is down, openings up, and placements up. The employment and labor statistics indicate that Wyoming's economy had its usual strong 3rd quarter.

A Wyoming miner, earning the average wage, working 40 hours per week and 50 weeks per year will make $21,440 during a year, as of the third quarter of 1981. This is up $220 from the second quarter of 1981 and $1,580 or 8% from 3/80. This compares with the Wyoming inflation rate of 10.56% during this same period. Miners' average weekly earnings, however, dropped during 3/80 (figure 4d) as the increase in average wage did not totally offset the drop in average weekly hours worked.

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[1] The most recent year's data are preliminary.
[2] Estimated. October 1979 data are not available.

Figure 5: Business Conditions

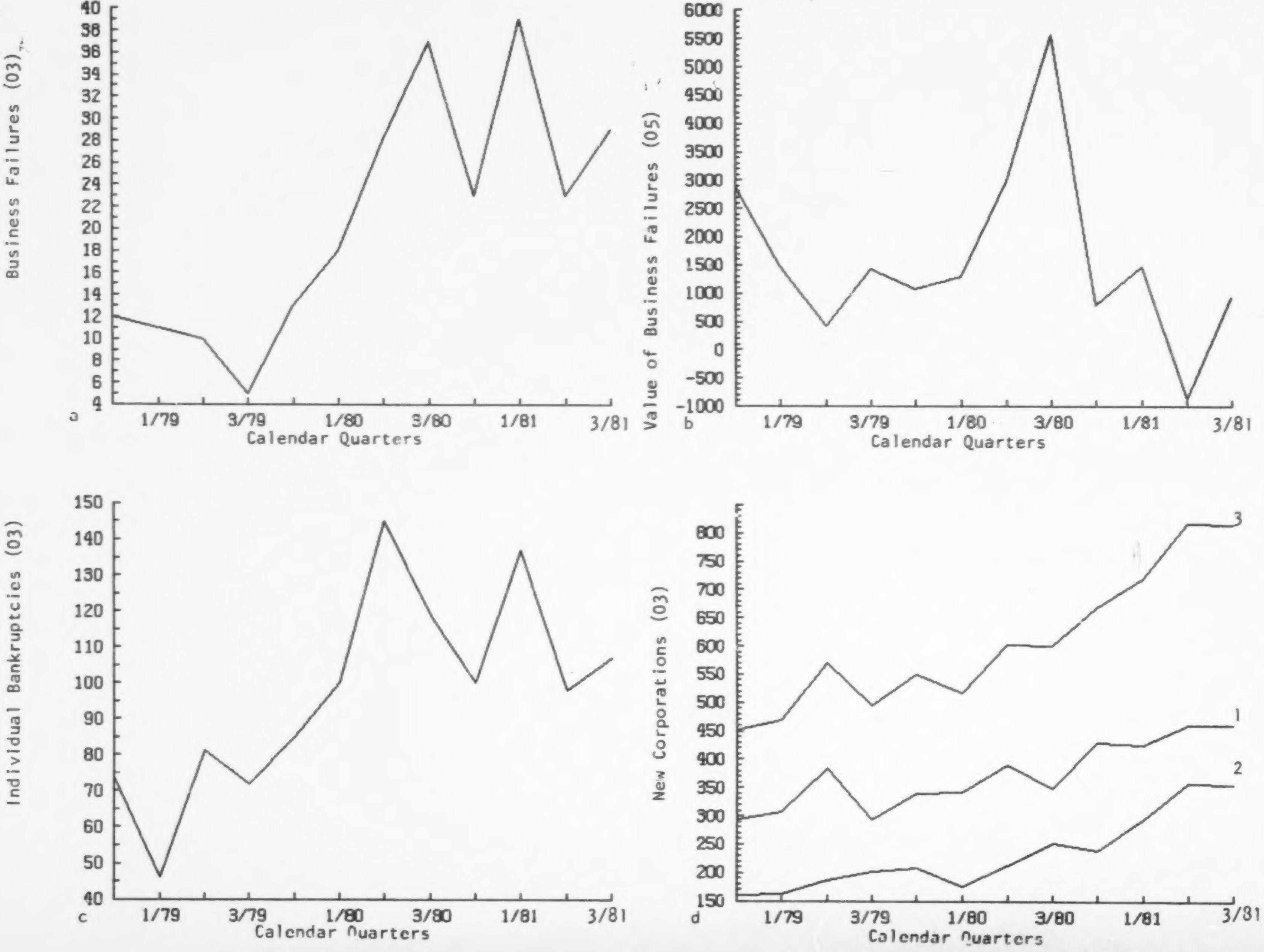

Table 5: Business Conditions

Calendar Quarters	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81
1. New Domestic Corporations (03)	293.	306.	383.	294.	340.	342.	391.	348.	429.	424.	459.	459.
2. New Foreign Corporations (03)	159.	162.	186.	201.	209.	175.	212.	252.	239.	294.	357.	356.
3. Total New Corporations (03)	452.	468.	569.	495.	549.	517.	603.	600.	668.	718.	816.	815.
4. Business Failures (03)	12.	11.	10.	5.	13.	18.	28.	37.	23.	39.	23.	29.
5. Value of Business Failures (05)	2886008.	1471387.	419868.	1429461.	1079393.	1307881.	2985150.	5565342.	799288.	1474498.	-868446.[1]	950251.
6. Personal Bankruptcies (03)	74.	46.	81.	72.	85.	100.	145.	119.	100.	137.	98.	107.

During the third quarter of 1981, (3/81), the number of businesses which failed increased by 26% over 2/81. However, there has been 21% decrease in business failures since the same period one year ago. The dollar value of these failures reached $950,251 during 3/81, which represents an 82% decrease from 3/80. While these statistics may indicate improvement in the economy, the number of business failures has increased by 580% since 3/79. This fact reflects the possibility that the economy is still suffering from the presence of high interest rates and an inflation rate in Wyoming of approximately 10.6%.

On an individual level, the number of bankruptcies has also risen since 2/81. More specifically, the change from 2/81 to 3/81 represents a 9% increase. However, when comparing 3/81 to 3/80, a 10% decrease in the number of individual bankruptcies is indicated. This comparison suggests that the current economic climate could be improving.

Another indication of improving business conditions, or at least a more stable environment, is the fact that the number of new domestic and foreign corporations has remained constant since 2/81. There has also been a 32% increase in new domestic corporations since 3/80 and a 41% increase in the number of new foreign corporations over the same period.

Figure 6: Construction

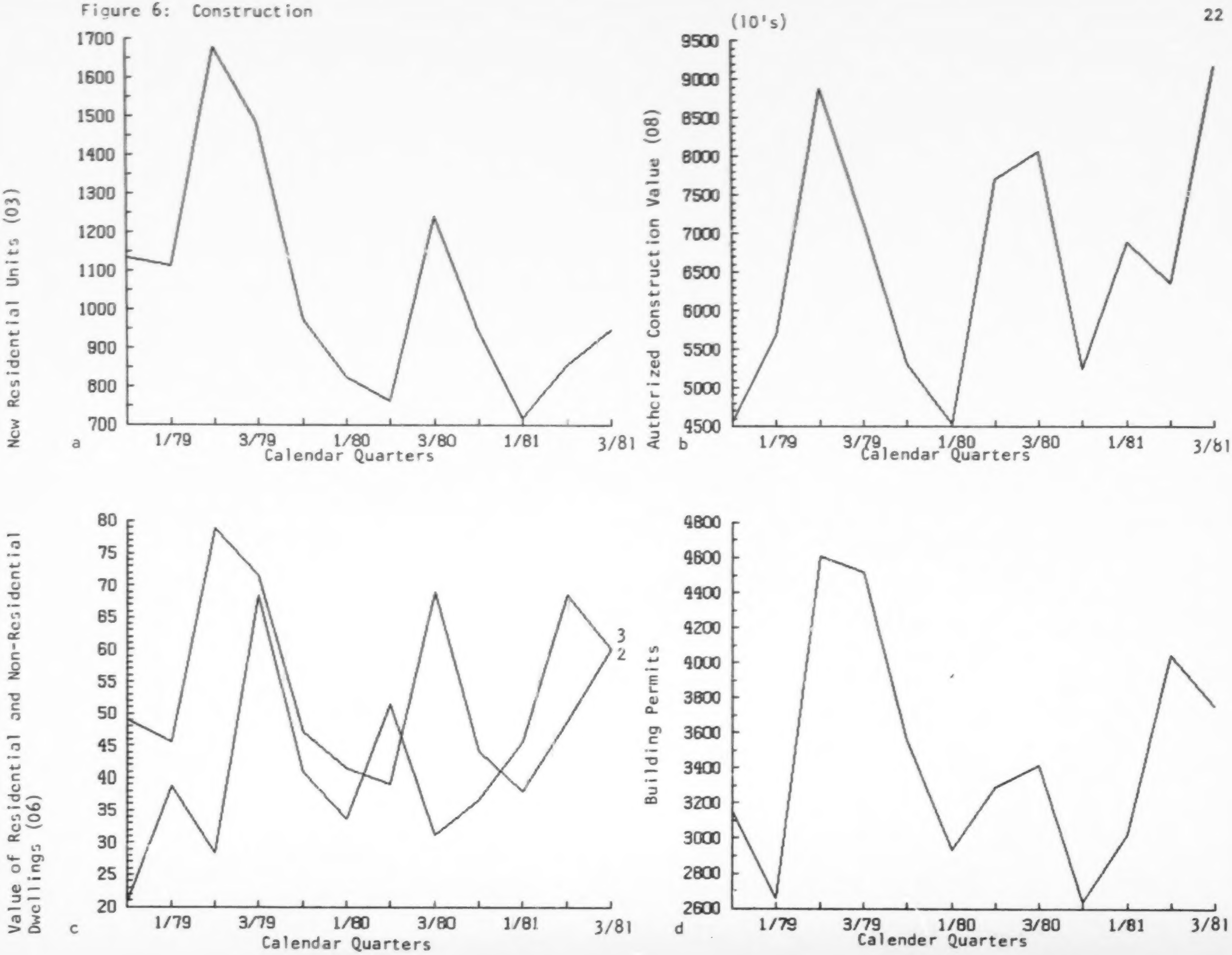

TABLE 6: Construction[1]

Calendar Quarters	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81
1. New Residential Dwelling Units (03)	1136.	1113.	1680.	1481.	976.	824.	762.	1240.	942.	720.	855.	948.
2. Value of Residential Dwellings Constructed (06)	49.0	45.6	78.9	71.6	47.1	41.6	39.0	69.0	44.1	38.0	48.9	60.0
3. Value of Non-Residential Construction (06)	20.7	38.7	28.3	68.3	40.9	33.6	51.5	31.2	36.7	45.6	68.5	60.1
4. Building Permits Issued in Selected WY Cities (03)	3151.	2661.	4604.	4515.	3560.	2934.	3293.	3414.	2637.	3027.	4040.	3755.
5. Value of Authorized Construction (08)	45672.	56756.	88798.	71643.	53215.	45371.	77045.	80648.	52550.	68995.	63557.	91789.

With housing starts at an all time low, the construction industry is suffering from the current economic condition of high interest rates and a deepening recession. The number of new residential units has increased by 11% since 2/81, but has dropped by 31% since 3/80, and by 36% since 3/79. While the 10% increase since 2/81 could reflect public anticipation of lower mortgage rates and the recent decline in the prime interest rate, the substantial decreases in construction over the past two years continue to indicate that credit is still tight and many people to either unable afford housing loans if obtained or are not able to qualify for home loans. The value of residential dwellings has increased by 23% since 2/81, and the value of nonresidential dwellings has decreased by 12.3% over the same period. Whereas the value of authorized construction has increased by 44.4% since 2/81, it has increased by only 13.8% since 3/79. The value of authorized construction has experienced wide fluctuations over the

past 3 years, many of which are due to seasonal factors. Another factor which may lead to these fluctuations is the changing interest rates. When interest rates rise the only way to maintain demand is to lower prices. A lower price depresses the output of the construction industry.

The number of building permits issued experienced a decline during 3/81 after a steady increase in this area since 4/80. There was a 7% decrease since 2/81 but there has been a 19.2% increase since 4/78.

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The number of building permits issued experienced a decline during 3/81 after a steady increase in this area since 4/80. There was a 7% decrease since 2/81 but there has been a 19.2% increase since 4/78.

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[1] Numbers appearing in this table may differ slightly from source data due to summing of rounded data.

Figure 7: Utilities

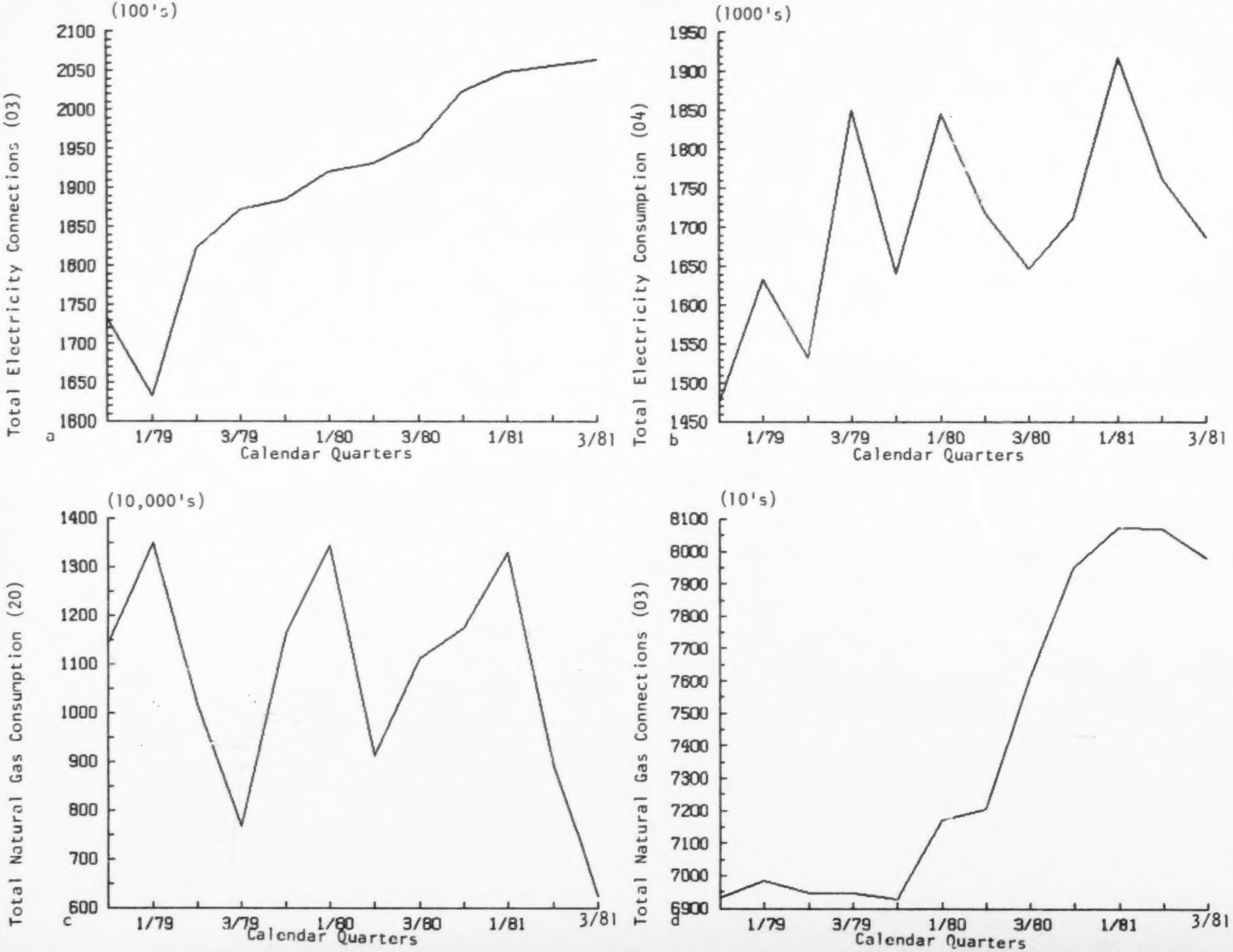

Table 7: Utilities[1]

Calendar Quarters	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81
1. Residential Electric Connections (03)	142624.	134249.	149212.	152198.	154682.	157183.	158424.	160950.	166342.	168477.	169494.	169760.
2. Residential Electric Consumption (04)	294235.	388504.	295537.	243384.	335770.	430258.	319866.	264960.	335159.	487386.	331256.	281840.
3. Commercial Electric Connnections (03)	24409.	23044.	26196.	26762.	27071.	27208.	27772.	28072.	28847.	29465.	29605.	29178.
4. Commercial Electric Consumption (04)	242095.	272535.	260014.	273717.	265711.	282677.	267804.	287954.	271561.	298580.	288617.	316859.
5. Industrial Electric Connections (03)	2820.	2704.	3283.	3352.	2891.	2891.	2957.	3057.	3312.	3377.	3384.	3484.
6. Industrial Electric Consumption (04)	898607.	938251.	939332.	1254562.	986692.	1092324.	1096646.	1013672.	1049382.	1100964.	1097628.	1015567.
7. Other[2] Connections (04)	3515.	3223.	3526.	4890.	3794.	4743.	3986.	3875.	3946.	3579.	3266.	4102.
8. Other Consumption (04)	40449.	34342.	38431	78105.	51980.	40623.	34114.	80540.	55639.	30333.	45006.	72993.
9. Residential Natural Gas Connections (3)	62951.	63457.	62765.	62977.	62977.	65346.	65731.	69297.	72468.	73699.	73712.	72968.
10. Residential Gas Consumptions (20)	3010805.	5070980.	2323223.	861109.	2556825.	4236345.	2311300.	787701.	2770400.	3923502.	2180779.	808764.
11. Commercial Natural Gas Connections (03)	6107.	6147.	6396.	6161.	5997 .	6095.	6026.	6360.	6561.	6595.	6557.	6402.
12. Commercial Natural Gas Consumption (20)	1465787.	2623980.	1101504.	367443.	1132437.	1872572.	976489.	347976.	1125956.	1766515.	970295.	395166.
13. Industrial Natural Gas Connections (03)	105.	119.	100.	99.	87.	87.	97.	91.	93.	92.	94.	90.
14. Industrial Natural Gas Consumption (20)	6886104.	5745774.	6602746.	6322784.	7734080.	6428686.	5564123.	9887644.	7647357.	7345317.	5607535.	4941018.
15. Other Natural Gas Connections (03)	170.	132.	216.	222.	222.	189.	216.	342.	363.	348.	344.	349.
16. Other Natural Gas Consumption (20)	59300.	57156.	153280.	113356.	209720.	905798.	261674.	98459.	204268.	252249.	147575.	87693.
17. Business Telephone Connections (03)	133786.	136662.	137967.	139457.	142877.	144906.	145863.	147317.	149949.	152263.	152669.	154234.
18. Private Telephone Connections (03)[3]	43593.	44178.	46337.	47448.	47748.	49252.	50367.	60876.	51043.	52272.	52193.	55379.

Total telephone connections increased in 3/81 for the 12th consecutive quarter. The 3/81 increase represents an annual rate of increase of 9.3%. The year to date increase in total phone connections represents an expected 5.7% increase in total phones in use for 1981. This growth in phone connections is related to the decrease in household size and increases in Wyoming's population.

Natural gas consumption continues its strong seasonal trend with reductions in 3/81 usage from 2/81. Consumption in 3/81 as compared with 3/80 is down 43.9% in total with industrial consumption down 50.02%, perhaps reflecting industry's growing concern for conservation, along with efforts to convert to more plentiful fuels. Electrical consumption registered an increase of 2.4% in 3/81 over 3/80, but a decrease in usage of 8.6% over 3/79%. Again industrial consumption leads the way with a 12.5% decrease in consumption between 3/81 and 3/79.

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[1] Some small utilities do not report, hence the data are slightly less than the actual state totals. Data are consistent. The same utilities' reports are included in each figure.

[2] Other includes Agriculture, Municipal, and Other Public

[3] Preliminary

Figure 8: Consumers

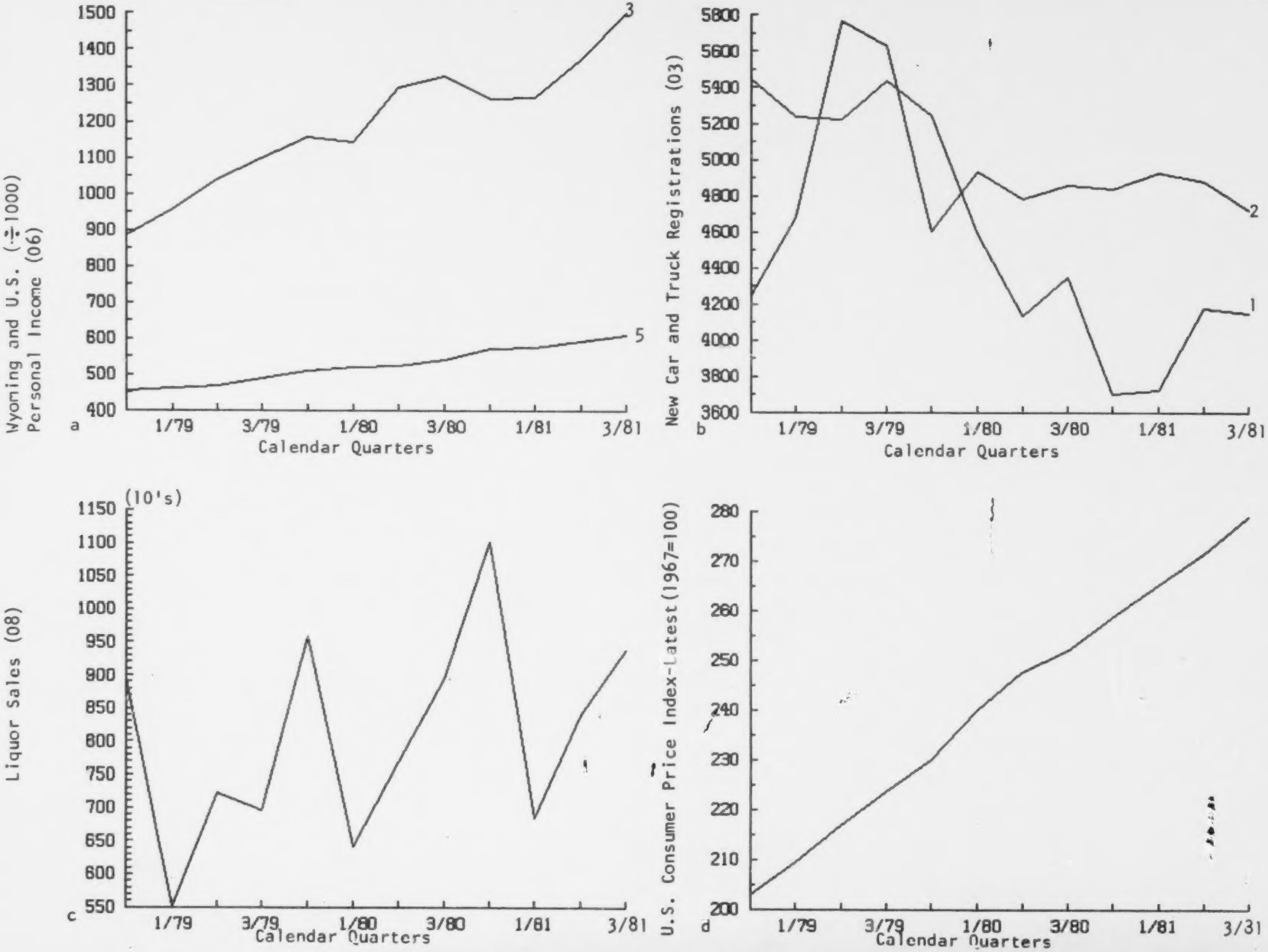

Table 8: Consumers

Calendar Quarters	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81
1. New Truck Registrations (03)	5446.	5241.	5223.	5435.	5248.	4593.	4134.	4353.	3706.	3723.	4175.	4152.[1]
2. New Car Registrations (03)	4249.	4681.	5765.	5628.	4608.	4937.	4787.	4859.	4839.	4926.	4879.	4722.[1]
3. Wyoming Personal Income (06)	885.	959.	1040.	1098.	1158.[2]	1143.	1296.	1326.	1264.	1268.	1375.	1500.[1]
4. U.S. Disposable[3] Income (07)	1525.	1572.	1602.	1640.	1683.	1765.	1784.	1841.	1897.	1948.	1986.	2050.[1]
5. U.S. Personal Income (06)	454648.	460875.	470299.	488614.	510219.[2]	521332.	524735.	541561.	572873.	574971.	594251.	610000.[1]
6. Latest U.S. Consumer[4] Price Index (1967=100)	202.9	209.3	216.9	223.7	230.0	239.9	247.8	251.9	258.7	265.2	271.4	279.1
7. Quarter's Average US CPI.	201.8	207.0	214.3	221.5	227.7	236.6	245.2	249.8	256.4	263.1	269.1	276.7
8. Liquor Sales (08)	8944.	5512.	7224.	6956.	9586.	6510.	7696.	8951.	11010.	6845.	8394.	9387.

Contrary to last year's seasonal trend, 3/81 estimated new car and truck registrations are down 3.2% and 0.6% respectively from 2/81 registrations. In addition, 3/81 car and truck registrations are down 2.8% and 4.6% below 3/80 registrations, and 10.7% and 27.1% below the 3/78 peak, respectively. The effects of a recession and high interest rates are evident, in particular since car and truck registrations could be expected to grow as a consequence of the state's population growth.

Preliminary data indicate that 3/81 Wyoming personal income rose an impressive 9.1% over 2/81. In 3/80, Wyoming's personal income was only 2.3% higher than in 2/80. During 3/81, the U.S. inflation rate was 2.8% (11.3% annual rate), and Wyoming's inflation rate was approximately 2.65% (10.6% annual rate). During 3/81, as well as over the last year (since 3/80), U.S. personal and disposable income rose at approximately the national rate of inflation. Wyoming personal income in 3/81 was up 13.1% over 3/80; 2.5% greater than the state's inflation rate during that period.

Liquor sales are being reported in WQU for the first time. The liquor sales vary seasonally with a peak during the fourth quarter of each year, and a valley during each first quarter (Figure 8c). The fourth quarter peak is probably due to Thanksgiving, Christmas, and New Year's Eve celebrations during that quarter. The long-run trend is one of continuous growth. Each quarter's data are higher than the same quarter of the preceding year. However, the increase in 3/81 over 3/80 (4.9%) is less than half the rate of inflation prevailing in the state during that time.

The latest comparative cost of living index (next page) for Wyoming cities and towns indicates that Jackson and Lusk continue to be the most and least expensive places to live, respectively. For both towns, housing costs are the major cause of their respective rankings. The most noticeable shifts in rank since the July survey were Gillette's rise from eighth to second, Pinedale's rise from 16th to ninth and Sundance's rise from 18th to 11th. Again, the housing component was the major factor.

In terms of 1974-9 per capita personal income and transfer payments (page after next) Wyoming compares very favorably to its neighbors and the nation. Throughout the period, Wyoming ranks first in per capita income; 5.7% above Colorado, second highest. Wyoming ranks last in transfer payments, also a general indication of a relatively better economic scene. The table at the bottom of the page provides for easier comparison of data in the first table.

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[1] Preliminary. An estimate based on trend and first 2 months of the quarter

[2] Estimated. Nov. 1979 data are missing

[3] Seasonally adjusted at annual rates

[4] Number shown is for the last month of the quarter

Consumers

Wyoming Comparative Cost of Living Index (October 7-9, 1981): Cheyenne = 100

City	Rank	All Items	Food	Housing	Transportation	Medical
Jackson	1	121.29	105.14	143.99	100.95	105.16
Gillette	2	112.24	108.44	121.36	104.50	104.73
Casper	3	111.70	103.18	121.98	105.94	108.00
Sheridan	4	110.94	100.17	120.40	104.62	98.69
Kemmerer	5	109.93	104.74	118.18	102.75	99.96
Riverton	6	109.85	103.85	114.86	108.07	102.43
Evanston	7	109.04	104.33	115.76	102.50	98.12
Rock Springs	8	108.83	103.70	114.72	105.16	96.18
Pinedale	9	107.80	102.50	114.04	103.35	102.78
Douglas	10	106.51	112.00	105.01	104.95	109.96
Sundance	11	106.46	107.25	113.15	100.11	100.24
Wheatland	12	105.87	103.43	108.97	102.40	96.15
Rawlins	13	105.63	102.16	112.22	101.45	90.75
Newcastle	14	104.92	105.70	107.69	98.16	102.29
Cody	15	104.31	107.32	106.82	100.35	97.02
Laramie	16	103.82	96.87	109.68	99.00	89.47
Thermopolis	17	103.77	110.48	103.07	98.82	96.33
Buffalo	18	102.62	106.84	100.47	100.97	100.00
Cheyenne	19	100.00	100.00	100.00	100.00	100.00
Worland	20	99.75	103.85	96.90	99.62	96.72
Torrington	21	94.45	97.50	88.26	97.77	99.10
Greybull	22	93.77	104.01	82.12	100.32	97.57
Lusk	23	91.20	99.46	77.62	97.31	99.26

Wyoming Comparative Cost of Living Index* (July 8-10, 1981): Cheyenne = 100

City	Rank	All Items	Food	Housing	Transportation	Medical
Jackson	1	122.14	98.99	148.31	98.90	101.15
Casper	2	111.01	105.51	121.01	102.85	105.72
Kemmerer	3	110.88	100.10	123.37	102.73	95.50
Evanston	4	110.64	100.65	123.09	98.87	98.33
Riverton	5	109.28	106.76	116.02	102.33	101.34
Rock Springs	5	109.18	104.17	115.82	106.75	96.65
Sheridan	7	109.02	101.13	117.82	100.71	98.62
Gillette	8	108.90	106.09	113.79	102.55	103.16
Douglas	9	108.04	110.92	107.77	103.38	111.10
Newcastle	10	107.06	113.98	109.61	96.96	102.79
Wheatland	11	106.09	109.74	106.86	101.62	96.10
Thermopolis	12	104.62	108.46	105.64	96.58	103.34
Rawlins	13	103.83	104.90	109.21	100.77	89.73
Laramie	14	102.75	97.49	108.88	97.58	88.64
Buffalo	15	101.66	106.10	101.22	99.16	99.45
Pinedale	16	101.43	102.68	100.51	100.02	100.66
Cody	17	100.94	111.34	99.32	98.82	95.02
Sundance	18	100.44	102.82	100.79	99.16	100.98
Cheyenne	19	100.00	100.00	100.00	100.00	100.00
Worland	20	98.19	102.82	95.34	97.75	96.06
Greybull	21	92.60	100.57	83.18	99.18	90.74
Torrington	22	91.95	99.21	82.18	97.45	97.63
Lusk	23	90.03	97.65	77.38	97.24	98.02

Source: Wyoming Department of Administrative and Fiscal Control

*Apparel and Recreation Indices not shown.

Comparison of Wyoming to the Nation and Neighbor States

Per Capita Personal Income:
U.S.A., Wyoming and Surrounding States

State	1974	1975	1976	1977	1978	1979
Wyoming	5,662	6,127	6,777	7,649	8,627	9,630
Colorado	5,500	6,006	6,526	7,209	8,102	9,114
Idaho	5,032	5,205	5,721	6,244	6,983	7,632
Montana	4,982	5,387	5,583	6,020	7,071	7,528
Nebraska	5,198	5,887	6,057	6,595	7,412	8,291
South Dakota	4,755	4,995	4,956	5,555	6,335	7,182
Utah	4,465	4,903	5,379	5,946	6,581	7,182
U.S.A.	5,428	5,861	6,401	7,035	7,846	8,757

Per Capita Transfer Payments:
U.S.A., Wyoming and Surrounding States

State	1974	1975	1976	1977	1978	1979
Wyoming	531.53	619.09	666.56	717.98	759.26	810.56
Colorado	592.41	730.73	799.47	863.20	901.75	984.69
Idaho	572.31	693.64	769.79	812.80	843.96	937.30
Montana	611.31	732.50	803.78	872.50	937.67	1044.61
Nebraska	570.34	694.81	738.81	796.41	865.61	961.81
South Dakota	575.67	682.79	748.15	799.19	855.93	961.58
Utah	517.56	637.70	682.96	728.86	779.31	841.09
U.S.A.	666.29	836.30	902.92	961.37	1026.21	1140.72

State Per Capita Personal Income as a Percent of
U.S. Per Capita Personal Income
Wyoming and Surrounding States

State	1974	1975	1976	1977	1978	1979
Wyoming	104.31	104.54	105.87	108.73	109.95	109.97
Colorado	101.33	102.47	101.95	102.47	103.26	104.08
Idaho	92.70	88.81	89.38	88.76	89.00	87.15
Montana	91.78	91.91	87.22	85.57	90.12	85.97
Nebraska	95.76	100.44	94.63	93.75	94.47	94.68
South Dakota	87.60	85.22	77.43	78.96	80.74	79.84
Utah	82.26	83.65	84.03	84.52	83.88	82.01

Personal Income by Place of Residence as a Percent of U.S.A.:
Wyoming and Surrounding States

State	1974	1975	1976	1977	1978	1979
Wyoming	.179	.184	.193	.204	.214	.225
Colorado	1.206	1.222	1.223	1.242	1.281	1.311
Idaho	.349	.339	.347	.351	.360	.358
Montana	.320	.322	.307	.303	.322	.307
Nebraska	.698	.728	.684	.678	.679	.677
South Dakota	.282	.272	.247	.251	.255	.250
Utah	.459	.472	.482	.496	.506	.510

Population as a Percent of U.S.A.:
Wyoming and Surrounding States

State	1974	1975	1976	1977	1978	1979
Wyoming	.171	.176	.182	.188	.195	.204
Colorado	1.190	1.193	1.200	1.213	1.240	1.260
Idaho	.376	.382	.388	.396	.404	.411
Montana	.349	.350	.352	.354	.357	.357
Nebraska	.729	.725	.723	.719	.719	.715
South Dakota	.322	.320	.319	.318	.316	.313
Utah	.558	.565	.574	.587	.603	.621

Figure 9: Government

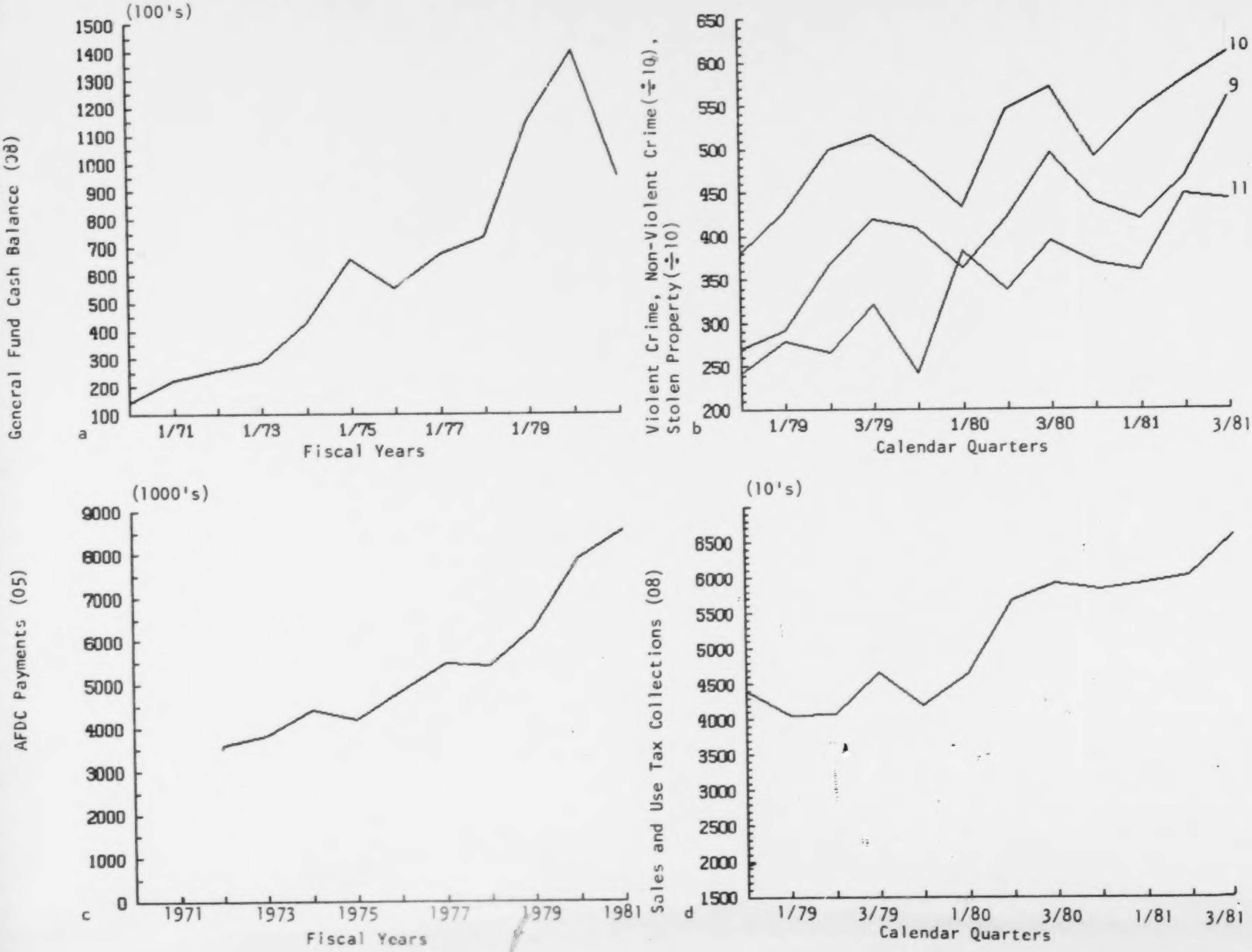

Table 9 : Government

FISCAL YEARS	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
1. Year-end General Fund Cash Balance (08)	14251.	22469.	25648.	28944.	42988.	65816.	55115.	67542.	73540.	115318.	140203.	95437.
2. Cigarette Tax Distributions (05)	1949653.	2047395.	2154581.	2418061.	2436332.	2581473.	2754790.	2859314.	3044161.	3212056.	3414416.	3535384.
3. Locally Assessed Valuation (25)	6207.	6362.	6617.	6971.	7563.	7582.	8855.	9708.	10204.	11568.	12614.	13980.
4. SBE[1] Assessed Valuation (25)	6972.	7482.	7743.	7890.	9527.	14102.	16039.	18334.	22313.	25458.	32537.	47783.
5. AFDC[2] Recipients (03)	INA	INA	24603.	24965.	27744.	27039.	27459.	28358.	27719.	27999.	31177.	32719.
6. AFDC[2] Payments (05)	INA	INA	3599787.	3827036.	4410386.	4193947.	4826305.	5483464.	5418206.	6291348.	7893345.	8542035.
7. Food Stamp Recipients (03)	INA	8886.	11205.	9940.	9402.	10484.	9610.	8795.	7762.	8445.	13286.	15133.
CALENDAR QUARTERS	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81
8. Sales and Use Tax Collection	44072.	40605.	40689.	46569.	41993.	46409.	56658.	59173.	58322.	59218.	60174.	65841.
Criminal Justice Statistics												
9. Violent Crime[3] (24)	270.	291.	367.	419.	410.	363.	421.	496.	439.	420.	468.	599.
10. Non-Violent Crime Crime[4] (24)	3803.	4276.	5003.	5172.	4803.	4331.	5464.	5710.	4916.	5430.	5783.	6111.
11. Stolen Property (08)	2421.	2789.	2666.	3207.	2421.	3837.	3374.	3945.	3696.	3601.	4471.	4421.
12. Stole Property Recovery Rate (02)	47.0	53.1	53.5	45.6	48.6	43.4	51.9	41.9	46.8	36.0	45.4	40.6
13. Percent of Crimes[5] Cleared (02)	INA	26.5	23.4	22.3	23.0	23.0	19.1	19.0	23.4	21.6	23.4	19.5

After five consecutive years of general fund surpluses, the balance on June 30, 1981, indicated a general fund deficit of $44.8 million for state fiscal year 1981 (figure 9 a). Meanwhile, the cigarette tax distributions continue to increase, as they have for each of the last 10 years. 1981 data indicate an increase of 3.54% in distributions over 1980.

Locally assessed and State Board of Equalization (SBE) assessed valuations both continue to rise. The SBE valuation increased more rapidly than the locally assessed valuation. In 1981, SBE valuation increased 46.85% over 1980, while locally assessed valuation increased 10.83%, slightly higher than the state's inflation rate of 10.7% during fiscal year 1981.

Over 8.5 million dollars were paid to 32,719 Aid for Families with Dependent Children recipients residing in Wyoming in 1981 (figure 9 c). This represents increases of 8.2% in dollars spent and 4.95% in number of recipients over 1980. The average recipient received 3.1% (much less than inflation) more in 1981 than in 1980. The number of food stamp recipients increased 13.9% in 1981 over 1980.

Statewide sales and use tax collections are up 9.4% during 3/81 over 2/81. This largely reflects the impact of increased tourism during the third quarter. Collections in 3/81 are up 11.3% over 3/80, slightly higher than the inflation rate of 10.56% prevailing during the same period.

Crime in Wyoming is increasing, with violent crime increasing 28% in 3/81 over 2/81 and nonviolent crime up 5.7% during the same period. However, these crimes accounted for less stolen property in 3/81 than in 2/81. Unfortunately, less of what was stolen was recovered, as the recovery rate fell 4.8 percentage points. Even more discouraging, less than 1 in 5 of the crimes reported were cleared; there was a decrease in clearance rate of 3.9 percentage points since 2/81.

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[1] State Board of Equalization

[2] AFDC: Aid to Families with Dependent Children

[3] Murder, Negligent Homicide, Forcible Rape, Robbery, Aggravated Assault

[4] Burglary, Larceny, Auto Theft

[5] Clearance of a Crime Indicates Resolution of a complaint by arrest or other extra-ordinary means

Health and Vital Statistics

Map 1a: Percentage change in births per capita from 1970 to 1980

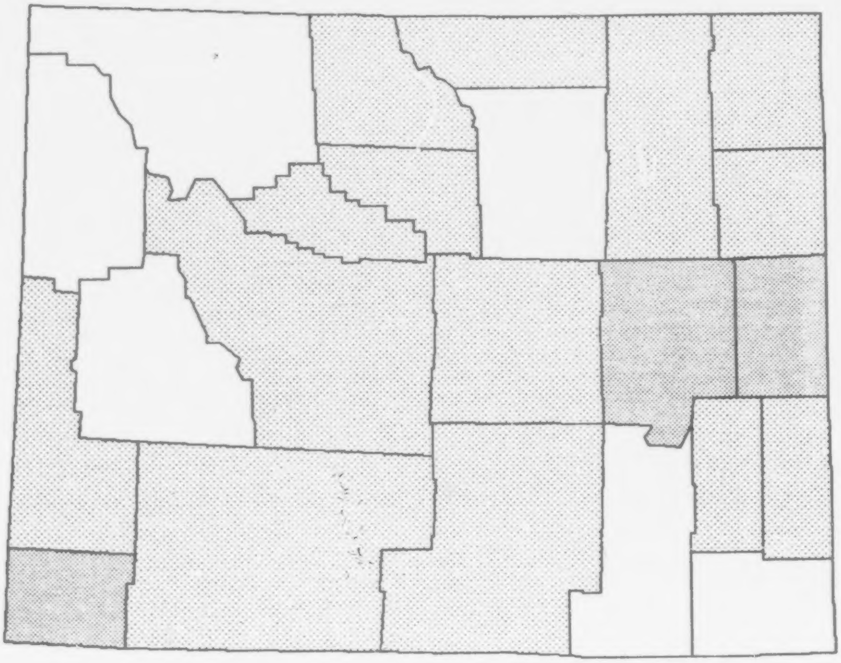

Legend
.822
.428
.034
-.360

Figure 10a: Births (#3)
Deaths (#4)

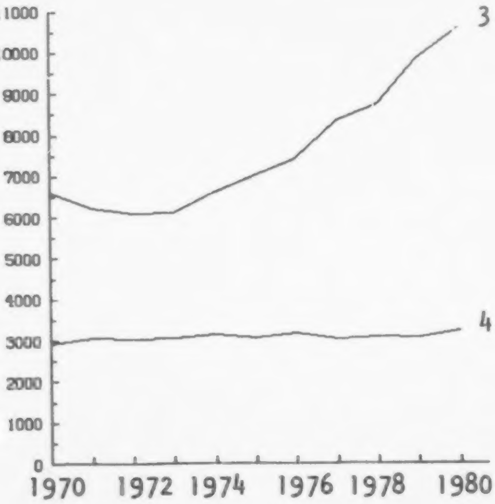


Figure 10b: Marriages (#1)
Divorces (#2)

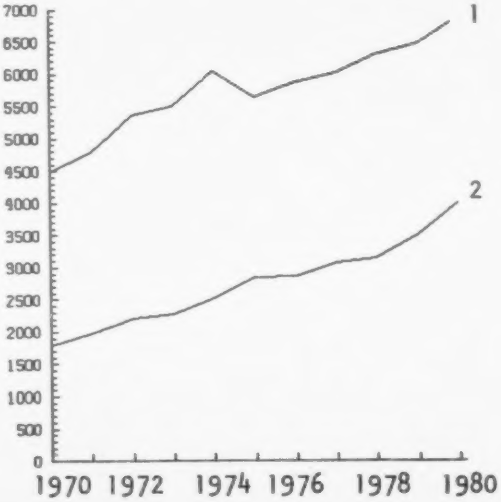


Table 10: Vitai Statistics and Health

Calendar Years	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
1. Marriages (3)	4495.	4778.	5359.	5507.	6050.	5650.	5872.	6012.	6298.	6459.	6867.	I.N.A.
2. Divorces ((3)	1797.	1988.	2210.	2280.	2523.	2835.	2850.	3068.	3130.	3510.	4002.	I.N.A.
3. Births (3)	6604.	6221.	6075.	6122.	6602.	7029.	7420.	8342.	8723.	9859.	10613.	I.N.A.
4. Deaths (3)	2926.	3048.	3038.	3066.	3133.	3071.	3158.	3045.	3100.	3061.	3211.	I.N.A.

Over the period 1970 to 1980, the number of marriages has steadily grown. There has been a 6% increase in the number of marriages since 1979 and a 52% increase since 1970 (population grew 41% from 1970 to 1980). The counties in Wyoming which have experienced the greatest change in the rate of marriage (Map 1b) include Goshen County, Sweetwater County, Lincoln County, Campbell County, and Crook County. Each of these areas experienced between a .329% and .784% change in the number of marriages per resident per year.

The number of divorces has followed a similar trend as that indicated by the marriage data. There has been a steady increase in the number of divorces since 1970. Over the period from 1979 to 1980, a 14% increase is reflected. A comparison of 1970 to 1980 represents a 123% increase (3 times greater than population growth) in the number of divorces. The Wyoming counties where rate of divorce per person increased the most are Big Horn, Johnson, Converse, Platte, Carbon, Sweetwater, and Lincoln. Both Sweetwater County and Lincoln County represent areas where the number of marriages per capita and the number of divorces per capita has increased more so then in other areas. Divorce data must be interpreted with caution, because divorces are recorded by place of occurrence, rather thanby place of residence of the divorcees.

When comparing the growth in the number of marriages to that of divorces, one sees that while both are experiencing increases, the number of divorces is rising at a more rapid pace, as indicated by the graph (Figure 10b).

Births and deaths have experienced fairly constant growth. The changes from 1979 to 1980 and from 1970 to 1980 respectively illustrate a 8% increase and a 61% increase in the number of births. Whereas one might expect that the counties where the number of marriages per capita has increased the most to also be the counties where the largest increase in the number of births per capita occurred, such is not the case. The counties where the percent change in the number of births per capita was the greatest are Converse, Niobrara, and Uinta.

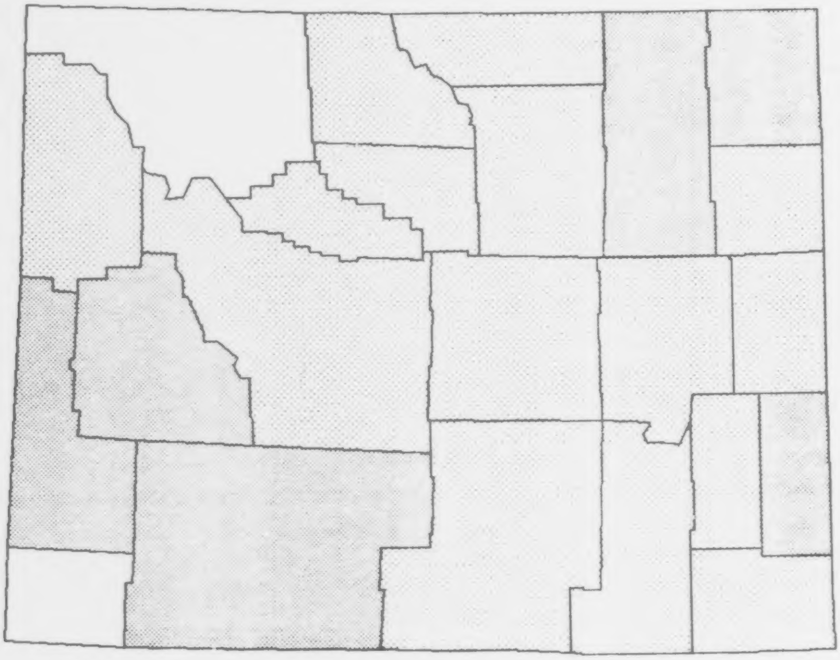
The number of deaths has increased since 1979 by 5%, and by 10% since 1970. The comparison of births to deaths reflect a more rapid growth in the number of births then in the number of deaths. The growth in marriages, divorces, and births at a rate greater than the growth of population, as well as the modest increase in yearly deaths, is probably an indication of a substantial reduction during the last decade in the average age of Wyoming's residents.

Health and Vital Statistics

.784
.329
-.126
-.580

Legend

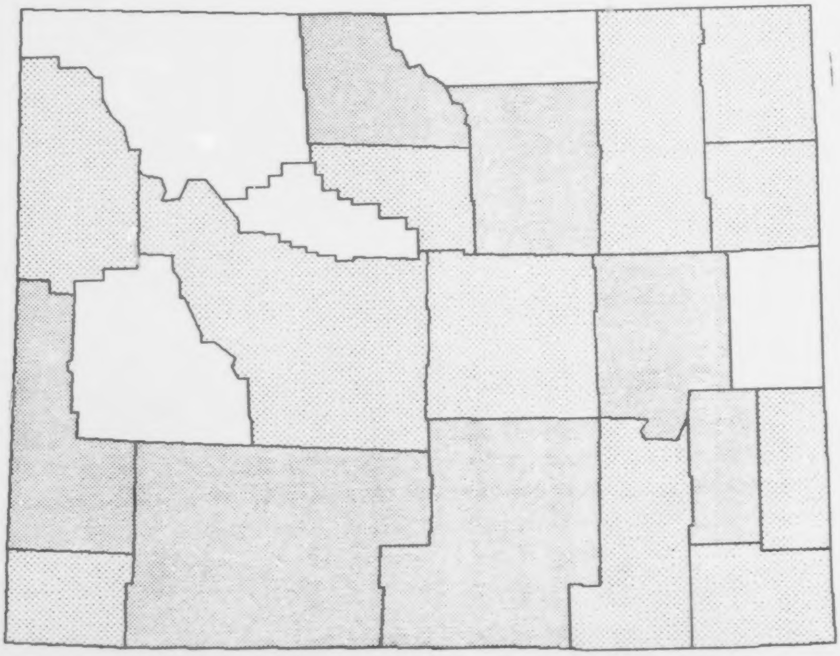
Map 1b: Percentage change in marriages per capita from 1970 to 1980



1.670
.993
.317
-.360

Legend

Map 1c: Percentage change in divorces per capita from 1970 to 1980



ACTIVE MEDICAL PHYSICIANS 1970, 1979 AND 1980 BY COUNTIES, AND 1980 MEDICAL FACILITIES BY COUNTIES

WYOMING COUNTY	POPULATION			POPULATION % CHANGE		PHYSICIANS			PHYSICIANS% CHANGE		NUMBER OF LICENSED HOSPITAL BEDS	PERCENT OCCUPANCY	NURSING FACILITIES-NUMBER OF LICENSED HOSPITAL BEDS	PERCENT OCCUPANCY
	1970	1979	1980	1970-80	1979-80	1970	1979	1980	1970-80	1979-80				
Albany	26,431	32,007	32,379	22.50	1.16%	26	38	40	53.85	5.26%	90	71	120	94
Big Horn	10,202	13,144	13,399	31.34%	1.94%	8	8	6	(25.00%)	(25.00%)	58	33	111	91
Campbell	12,957	23,450	25,911	50.01%	10.49%	8	16	21	162.50%	31.25%	52	78	120	94
Carbon	13,354	21,061	23,554	45.70%	11.84%	12	19	18	50.00%	(5.26%)	85	47	138	94
Converse	5,938	13,384	14,016	136.04%	4.72%	3	6	7	133.33%	16.67%	32	54	60	88
Crook	4,535	5,661	5,777	27.39%	2.05%	1	4	2	50.00%	(50.00%)	16	53	0	NA
Fremont	28,352	41,163	42,932	51.42%	4.30%	25	60	63	152.00%	5.00%	121	74	150	94
Goshen	10,886	13,459	13,519	24.20%	.45%	12	10	11	(8.33%)	10.00%	56	53	72	100
Hot Springs	4,952	6,127	6,326	27.75%	3.25%	8	7	9	12.50%	28.57%	50	38	194	96
Johnson	5,587	7,388	7,532	34.81%	1.95%	4	4	6	50.50%	50.00%	35	49	104	99
Laramie	56,360	66,232	66,790	18.51%	.84%	77	96	113	46.75%	17.71%	300	63	274	95
Lincoln	8,640	12,406	12,808	48.24%	3.22%	4	5	7	75.00%	40.00%	35	32	0	NA
Natrona	51,264	72,409	73,687	43.74%	1.76%	64	89	119	85.94%	33.71%	282	60	278	76
Niobrara	2,924	3,132	3,155	7.90%	.73%	2	2	2	0.00%	0.00%	12	35	36	88
Park	17,752	21,659	21,787	22.73%	.59%	18	26	29	61.11%	11.54%	89	49	123	100
Platte	6,486	9,683	9,441	45.56%	(2.50%)	3	4	5	66.67	25.00%	43	56	40	98
Sheridan	17,852	27,720	28,397	61.87%	4.25%	21	44	47	123.81%	6.82%	97	62	120	97
Sublette	3,755	4,753	4,751	26.52%	(.04%)	2	3	3	50.00%	0.00%	0	NA	0	NA
Sweetwater	18,391	40,379	41,102	123.49%	1.79%	11	30	36	227.27%	20.00%	100	48	101	98
Teton	4,823	8,400	8,896	84.45%	4.67	9	23	27	200.00%	17.39%	43	52	12	100
Uinta	7,100	12,311	12,645	78.10%	2.71%	13	12	14	7.69%	16.67%	372	NA	26	94
Washakie	7,569	9,687	9,699	28.14%	0.12%	7	9	8	14.29%	(11.11%)	36	60	76	97
Weston	6,307	7,749	7,998	26.81%	3.21%	3	4	4	33.33%	0.00%	30	44	41	86
Wyoming	332,416	473,466	487,001	46.50%	2.86%	341	519	597	75.07%	15.03%	2034	58	2196	92

*Source: Wyoming Department of Health, Division of Health and Medical Services. *Wyoming Health Resource Profiles 1981*.

Figure 11: Education

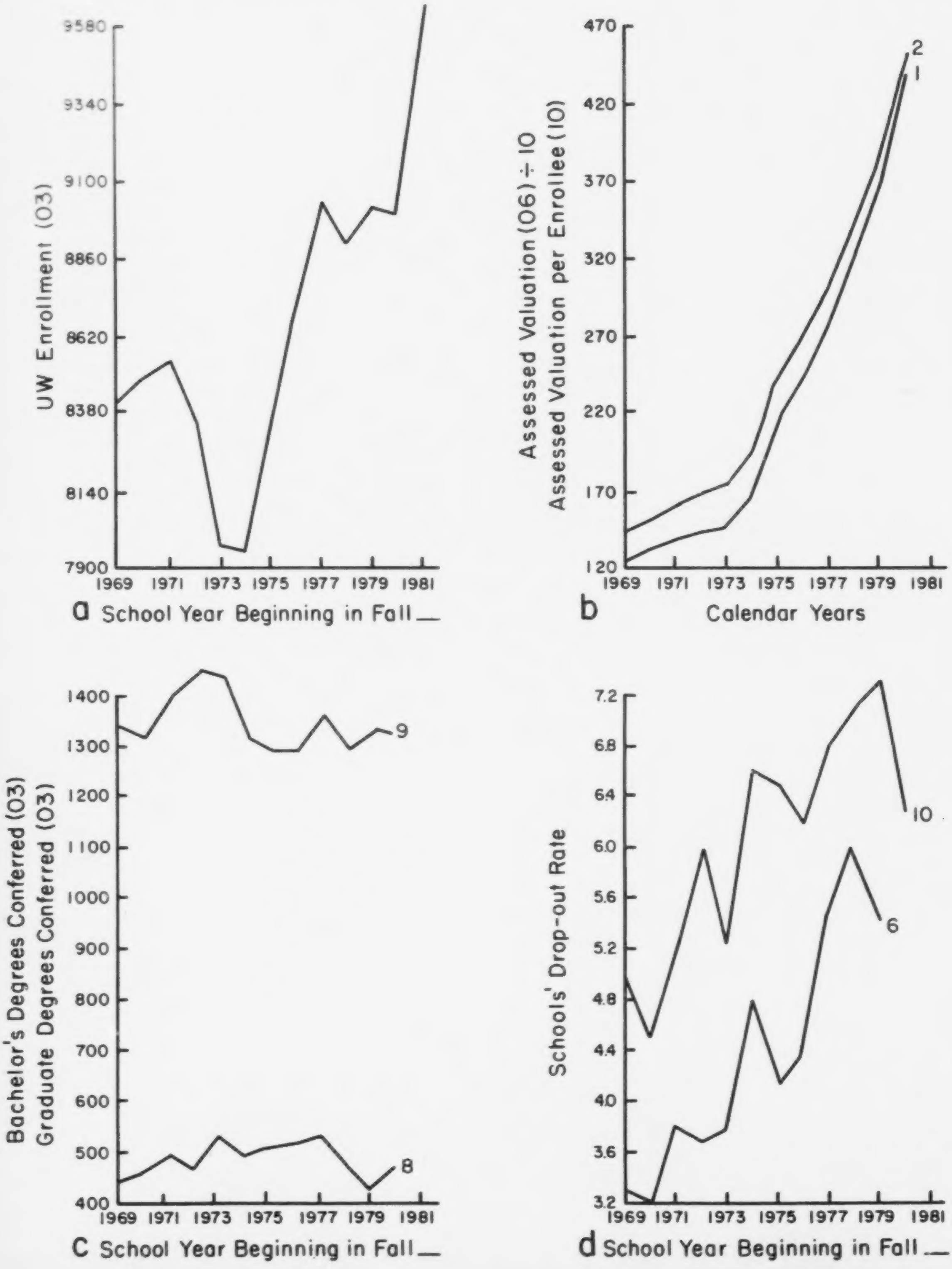


Table 11: Education

	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980
1. Assessed Valuation(06)	1237	1318	1384	1436	1486	1709	2168	2489	2804	3252	3703	4515
2. Assessed Valuation (10) Per Enrollee[1]	143.1	151.7	160.3	167.0	174.0	197.4	245.9	274.8	303.7	344.7	387.7	459.3
3. Enrollment (03)	86440	86886	86430	85975	85391	86584	88184	90587	92321	94328	95505	98305
4. FTE[2] Classroom Teachers (03)	I.N.A.	I.N.A.	I.N.A.	4735.0	4564.6	4678.9	4751.9	4916.8	5024.7	5186.6	5378.3	5539.9
5. Pupils/Teachers - Ratio (03)	I.N.A.	I.N.A.	I.N.A.	18.2	18.7	18.5	18.6	18.4	18.4	18.2	17.8	17.7
6. Drop-Out Rate	3.3	3.2	3.8	3.7	3.8	4.8	4.1	4.4	5.5	6.0	5.4	I.N.A.
7. Enrollment, University of Wyoming (UW) (03)	8419	8495	8546	8369	7971	7949	8322	8726[3]	9031	8923	9024	9014[4]
8. UW Graduate[5] Degrees Conferred (03)	443	453	496	464	531	491	507	517	531	476	431	474
9. UW Bachelors[5] Degrees Conferred	1344	1315	1397	1444	1433	1306	1282	1283	1359	1289	1332	1320
10. UW Withdrawal[6]	5.0	4.5	5.2	6.0	5.2	6.6	6.5	6.2	6.8	7.1	7.3	6.3

The total and per enrollee assessed valuation rose more quickly during the 1970s than inflation and the state's 41% population growth during the decade would account for. Enrollment is up at the University of Wyoming (UW) and at the grade and high school level. The state's growing population is offsetting the effect of declines in the nation's school age population, which is resulting in declining enrollments and school closures elsewhere in the U.S.

The brief decline in UW enrollments in the fall of 1973 and 1974 is showing up in a slight decrease in degrees conferred in 1978 through 1980. The substantial increase (21.2%) in enrollment since 1974 foreshadows future increases in degree conferments. The withdrawal rate at UW generally rose throughout the last decade; it was up 40% from 1970 to 1979. Interestingly, the ups and downs in the UW withdrawal rate trend coincide almost perfectly with the schools' dropout rate trend.

Maps 2a through 2d indicate the spatial variability of the school assessed valuation per enrollee, the drop-out rate, and the changes in those variables in the last decade. Many of the impact counties, such as Campbell, Carbon, Sweetwater, and Uinta, stand out on at least 3 of the 4 maps. Teton County is an interesting case also. While ranking relatively high in per capita income (see cover), the small percentage of privately owned land in Teton Copunty probably accounts for a relatively low rank in per enrollee assessed valuation.

---

[1] Data are for the fall of the year indicated by the column heading for Series 2-7.

[2] FTE: full time equivalent.

[3] Beginning 1976, data include students enrolled in UW degree program at Casper.

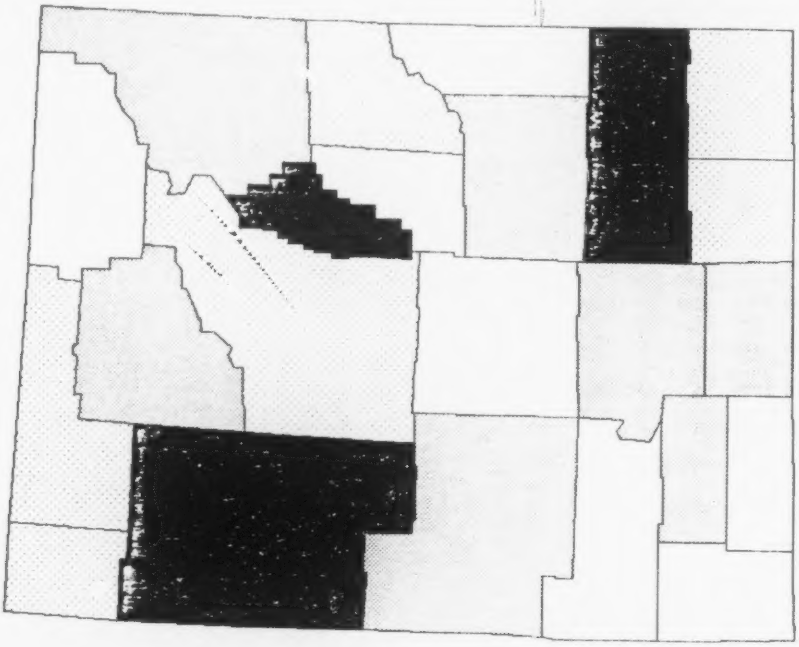
[4] Fall, 1981 enrollment is 9634.

[5] August and December of the year indicated, and May of the year following.

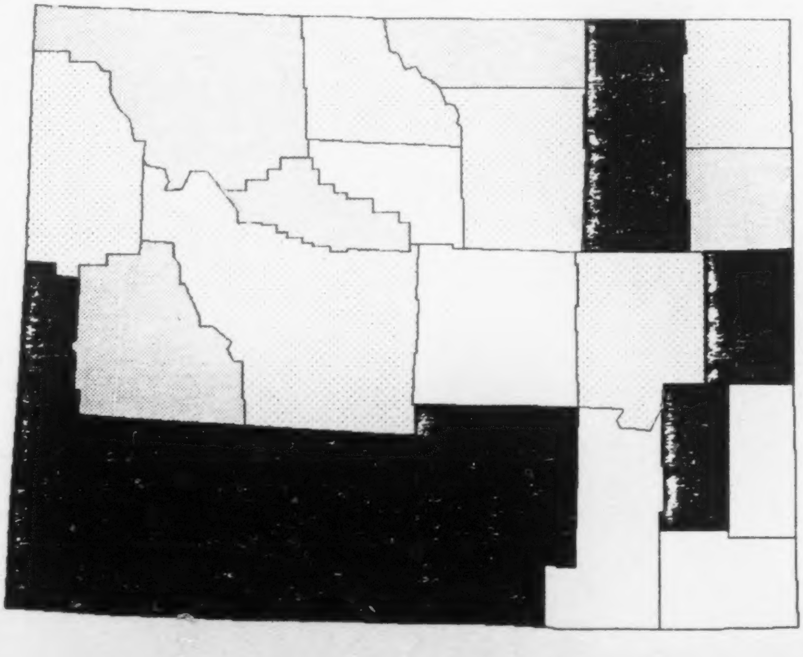
[6] Students withdrawing divided by enrollment times 100.

Education

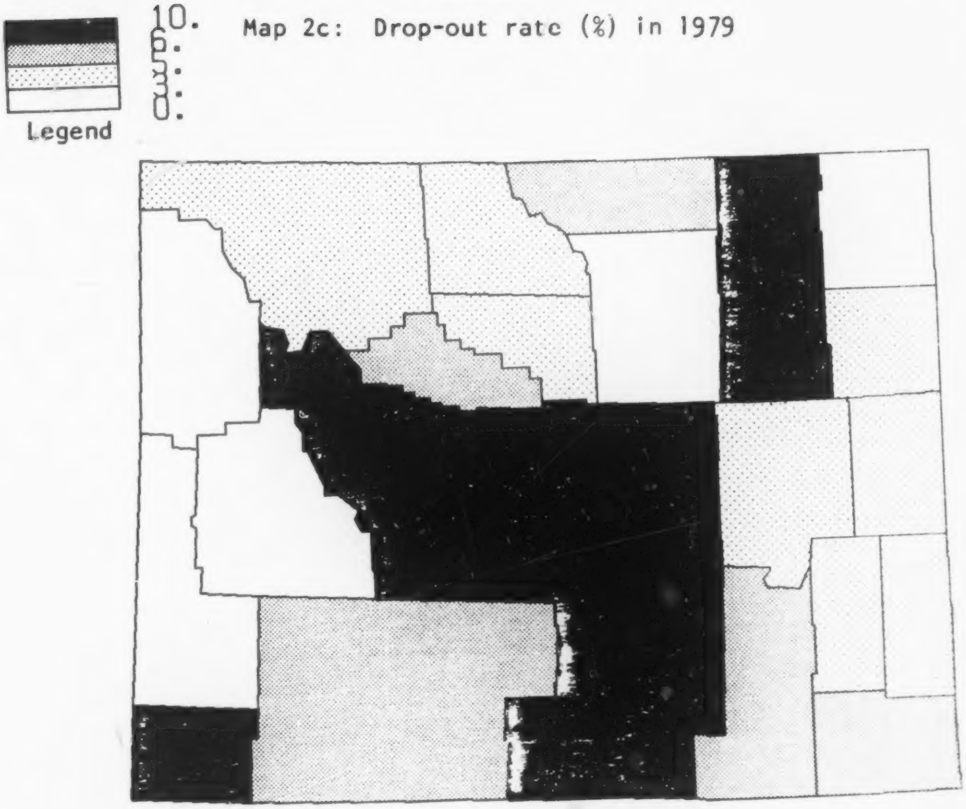
Map 2a: Assessed Valuation per school enrollee in 1980


900000.
85000.
50000.
30000.
0.
Legend

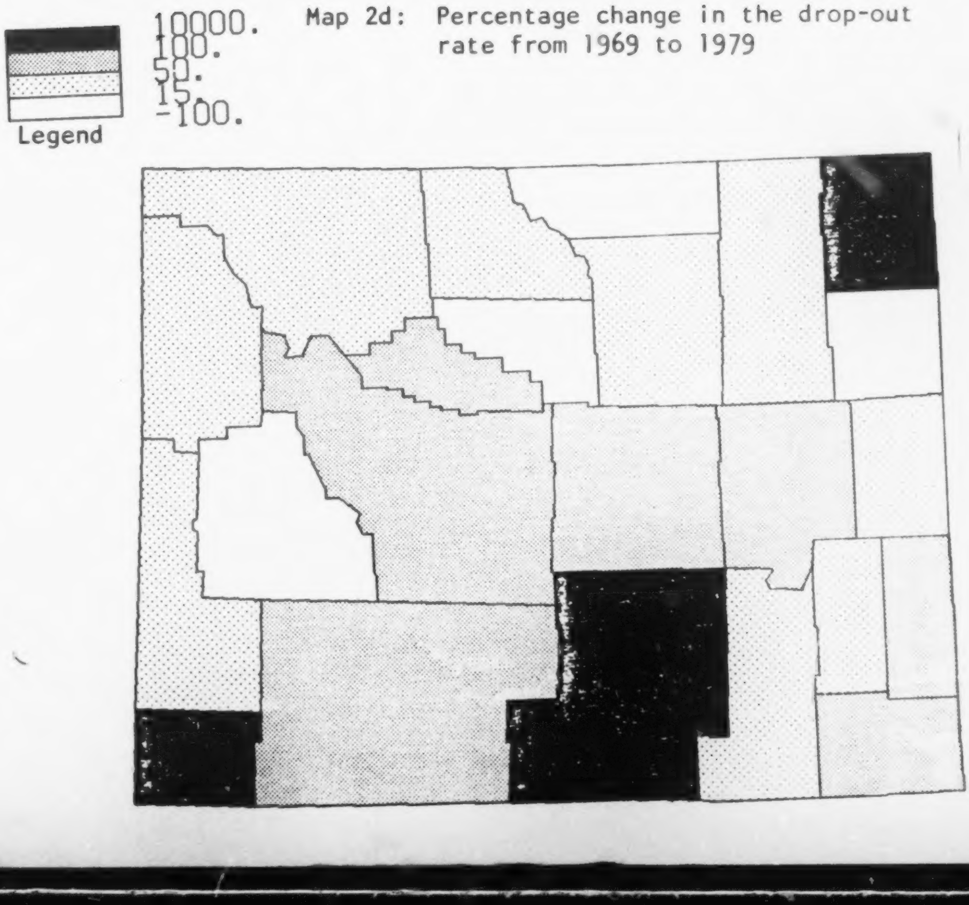
Map 2b: Percentage change in assessed valuation per enrollee from 1970 to 1980


600.
310.
250.
210.
0.
Legend

Education


10.
6.
3.
0.
Legend

Map 2c: Drop-out rate (%) in 1979


10000.
100.
50.
15.
-100.
Legend

Map 2d: Percentage change in the drop-out rate from 1969 to 1979

TABLE 12: Banking and Finance

Calendar Quarters	4/78	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81
1. Total Bank Loans (00)	1514223.	1531115.	1618031.	1667332.	1661606.	1677881.	1689496.	1722916.	1764381.	1808747.	1898325.	1929706.
2. Total Bank Deposits (00)	2404163.	2336169.	2439970.	2510176.	2734107.	2651863.	2755238.	2826427.	3034647.	2968348.	3112270.	3161593.
3. Total Bank Demand Deposits (00)	729293.	674252.	706104.	748983.	8654562.	746467.	796838.	839111.	878444.	736161.	737837.	759658.
4. Banks' Loan - Deposit Ratio	.63	.66	.66	.66	.61	.63	.61	.61	.58	.61	.61	.61
5. Savings and Loan[1] Mortage loans (00)	611217.	623282.	648725.	687735.	706103.	711387.	719627.	741479.	770474.	776172.	788526.	785208.
6. Savings and Loan[1] Deposits (00)	607537.	638431.	666293.	689301.	724538.	749816.	7701856.	788448.	842740.	874533.	891585.	911587.

Since the second quarter of 1981 total bank loans have risen by 2%,a slower rate of growth than the 4.95% growth between 2/81 and 1/81. This comparative decline could be a by-product of the current recession. Total bank deposits have also grown by a similarly small amount, 1.6%, compared to the 4.84% growth between 2/81 and 1/81. The growth of total demand deposits since 2/81 has exceeded the small increase between 1/81 and 2/81. Total demand deposits for 3/81 showed a 3% increase. The reversals in these three categories could be due to the fact that during a recession borrowing needs are reduced, hence the lower total bank loan growth. The higher level of total demand deposits could reflect the recent declines in the prime interest rates, and therefore, the opportunity cost of holding money in noninterest accounts is declining.

The level of savings and loan mortgage loans have decreased since 2/81 by less than 1% (.42%). This is the first decrease noted on the data available. Savings and loan deposits increased by 2.24% since 2/81 which exceeds the 1.95% increase calculated for the previous period. This could indicate that,as a result of fewer borrowing needs and individual uncertainty as to the total impact of the recession, the public is placing more of their earnings in savings.

---

[1] Only members of the Federal Home Loan Bank Board are included.

Key to Units Code

01	THOUSAND BOARD FEET
02	PERCENTAGE
03	NUMBER OF INDIVIDUALS
04	THOUSAND KILOWATT HOURS
05	DOLLARS
06	MILLIONS OF DOLLARS
07	BILLIONS OF DOLLARS
08	THOUSANDS OF DOLLARS
09	NUMBER OF HOUSEHOLDS
10	HUNDREDS OF DOLLARS
11	SHORT TONS
12	THOUSAND SHORT TONS
13	MILLION CUBIC FEET PER DAY
14	THOUSAND BARRELS PER DAY
15	INDIVIDUAL VISITORS
16	GALLONS
17	AVERAGE DAILY NUMBER OF VEHICLES
18	MILLION MILES
19	FATALITIES PER MILLION MILES
20	THOUSAND CUBIC FEET
21	KILOWATT HOURS
22	THOUSANDS OF GALLONS
23	VISITOR DAYS USE
24	NUMBER OF INDIVIDUAL CRIMES REPORTED
25	HUNDREDS OF THOUSANDS OF DOLLARS

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C. Series 7- 9

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Format

For data available at least quarterly, the last 12 quarters are printed in WQU. In this edition, published series begin with the 4th quarter of 1978, and end with the 3rd quarter of 1981. For other data series (primarily annual), the most recent observations, up to 12, are published in WQU. Most annual data series will reappear in WQU only when updated, or about every fourth issue. Quarters are calendar quarters. For example, the 3rd quarter is composed of July, August, and September. In the table headings and narratives, a particular quarter will be indicated by notations such as 2/80 (2nd quarter,1980), 1/79 (1st quarter, 1979), and so on.

Beside each data series name is a two-digit number in parentheses. The number is a data value units (such as dollars, tons, feet, miles, etc.) code. The key to the units code follows the last data page. Following the units code page is a bibliography of data sources, listed by WQU page number of the data.

Throughout WQU, all data are for the state unless otherwise stated. The most recent year's data should be viewed as preliminary, due to revisions. The acronymn "INA" signifies that information is not available. Some graphics are used to illustrate trends. When more than one trend line appears on a graph, the line will be labeled with a number which matches the number of a data series on the accompanying table.

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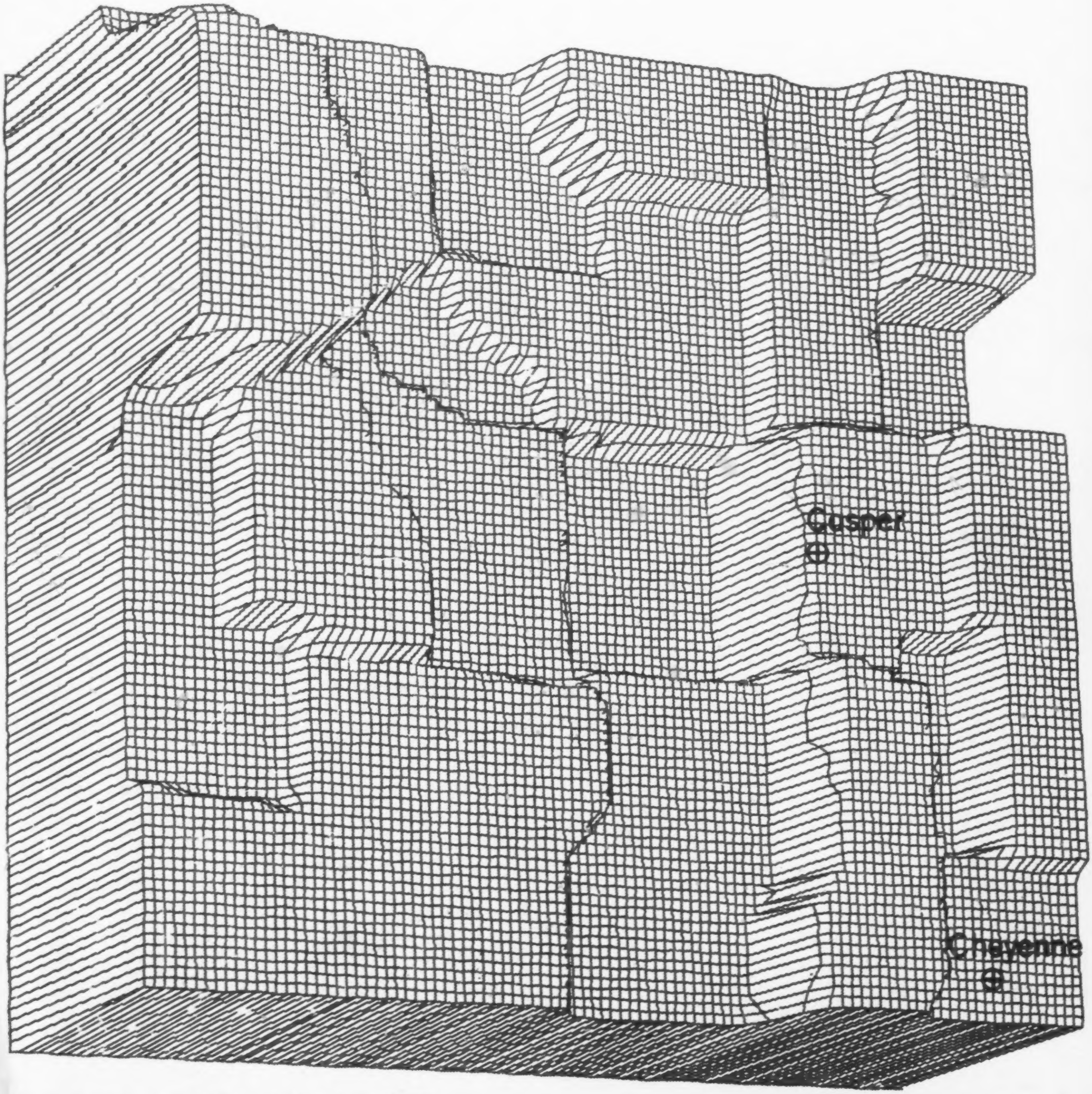
Spring 1982
Vol. 1, No. 3

IPR

Wyoming Quarterly Update


Casper
Cheyenne

Degree of Economic Specialization - 1978

Wyoming Quarterly Update

Wyoming Quarterly Update (WQU) represents the efforts of the Institute for Policy Research (IPR) at the University of Wyoming to provide improved data access services. The data presented in WQU are assembled from secondary sources, such as government agencies and private industry. The staff of IPR greatly appreciates the ongoing cheerful cooperation of each of the data sources listed in the bibliography.

WQU provides current economic indicators and timely, easily accessible data. Most of the data published in WQU are updated quarterly with the most current numbers. The complete data sets from which WQU originates are maintained, together with documentation, in machine-readable form by IPR. Many data series, such as gasoline sales and taxation data, span more than 30 years. Numerous other series cover 20 years or more.

Efforts to expand the subject and geographic detail (county level data) of data sets will be made continuously. Featured for the first time in this edition are county profiles. Current data, graphics, and discussion are presented for Teton and Big Horn Counties in this edition. Each subsequent edition of WQU will feature two to three county profiles. At that rate, each Wyoming county will be covered every two to three years. Current plans are to cover Uinta, Lincoln, and Fremont Counties in the next WQU (June, 1982), and Natrona and Laramie Counties in the subsequent (September, 1982) edition. Expert commentary on the outlook for various economic sectors has been expanded, from four sectors in the last edition to five sectors in this edition. Each subsequent edition of WQU will continue to feature approximately five to seven expert commentaries. The WQU staff is very grateful to these expert commentators for their contributions.

The cover page of each edition features a contour map which illustrates the geographic distribution of a particular variable. This edition features a contour map of a measure of the degree of economic specialization of each county in 1978. For instance, the lowest areas correspond to the counties which in 1978 were most diversified. In the present context, diversification (or specialization) was determined by comparing the percentage of each county's personal income from each economic sector to the state's percentage in that sector.

First-time readers of WQU should refer to the "Format" (page nine) for an explanation of numerical codes and table formats.

For additional information, to make suggestions, or to request data, contact WQU project co-manager John Merrifield at:

The Institute for Policy Research
University Station, Box 3925
Laramie, WY 82071
(307) 766-5141

Institute for Policy Research
College of Commerce and Industry
and College of Arts and Sciences
University of Wyoming

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Project Managers....................John D. Merrifield
Rob Senser
Editorial Advisors....................Shelby Gerking
G. Fred Doll
Copy Editor....................Kate Missett
Word Processing....................Lorri Fuhs Pedersen
Editorial Assistance....................Beth Daniels
Research Aides....................P. Bruce Waldo
Julie Gizirski

Graphics
Cover Page, Figure 9-13, Maps 1-2....................University of Wyoming
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Perspective on the Wyoming Scene

by John Merrifield

After months of recession, many Americans have lost confidence or patience with the Reaganomics program. In a recent ABC News/Washington Post News Poll (Washington Post, 2/20/82), only 35 percent of the respondents were for continuing the current economic policy, and 61 percent were for trying something else. However, a majority in the same poll ruled out higher taxes and lower defense spending as part of the something else to be tried. Despite public opinion and admissions by administration officials such as Secretary of Commerce Baldridge that "the recession has yet to run its course" (Wall Street Journal, 3/2/82), President Reagan appears determined to stick to current policies.

High unemployment rates, record high real interest rates, and expected high budget deficits are seen as the major obstacles to a sustained economic recovery. A "robust" recovery and sustained growth are still promised for the spring of 1982 by Reagan administration officials (U.S. News and World Report (USNWR), 2/22/82). Other analysts are less optimistic. A USNWR (2/22/82) poll of 44 economic forecasting outfits found that expected GNP growth ranged from 3.8 to -1.5 percent, and averaged about zero. Those analysts expected an end to the recession in three to four months, but unlike administration advisors had little confidence that the recovery could be sustained.

The unemployment rate for January was 8.5 percent; 0.3 percent lower than the 8.8 percent revised figure for December (Business Week, 2/22/82). Unfortunately, the reasons given for the decline were not encouraging. The drop in the unemployment rate was attributed to a temporary reduction in the labor force because of bad weather and job search frustration. Most analysts expect the unemployment rate to reach a post-war high over nine percent before the recession ends (USNWR, 2/22/82). Even Reagan advisors expect the rate to average 8.9 percent during 1982 (Ibid). The February unemployment rate was back to 8.8 percent (CBS Radio News, 3/5/82).

Despite declining nominal interest rates during 4/81, real interest rates reached record highs. Real interest rates are determined by subtracting the inflation rate from the nominal rate of interest. One type of interest, the prime rate, averaged 16.8 percent (Bureau of Economic Analysis report to IPR) from October through January, while the annual rate of inflation during that four-month period was 3.2 percent (Ibid). The fall in the prime rate did not match the decrease in inflation rate, resulting in record real interest rates. The news on inflation is encouraging, but the high real interest rates are likely to continue to exert downward pressure on long-range investment planning. Neither Reagan advisors or independent analysts expect inflation to remain at 3.2 percent throughout 1982, but even with the anticipated recovery, inflation is forecast to be a much-improved six to seven percent for all of 1982.

The amount and impact of the fiscal year 1983 federal budget deficit is the most controversial issue. In a speech in Los Angeles on March 3, President Reagan described the projected deficits as a "necessary evil" (CBS Radio News, 3/3/82). The administration view is that the incentives in the new tax cuts will increase savings enough to finance the deficits and provide funds for private investment at reasonable interest rates. There is some evidence to support that assertion. Despite recession, the personal savings rate rose to six percent in 4/81, the highest rate since 3/80 (Business Week, 2/8/82). However, the savings rate would have to increase at a rate of 17 percent per year to meet President Reagan's objectives; faster than the 13 percent annual rate of increase which prevailed during the banner years which followed the 1964 tax cut (Business Week, 3/8/82). A more widespread belief is that deficits will be larger than administration forecasts, and will have the effect of keeping interest rates high and thereby snuff out an economic recovery. For instance, the Congressional Budget Office foresees higher budget deficits than the administration; almost twice as high ($140 billion vs. $71.9 billion) in fiscal year 1985 (Wall Street Journal, 2/26/82). Both forecasts assume that the president will get all the budget cuts he requested by congress. However, most business people do not expect spending cuts or increased revenues to be as high as the president promises (Business Week, 2/22/82). How the deficits actually affect the economy will not be known for some time. It is sure to be one of the more interesting results of the supply-side economics experiment.

Other symptoms of the current recession include the decline in nonfarm productivity. The news is good and bad. The 6.8 percent decline (annual rate) in 4/81 was a post-war, one-quarter record (Wall Street Journal, 3/2/82). However, for all of 1981, productivity rose 0.9%, the first increase in the last four years (Ibid). The 4/81 drop in productivity, together with the high unemployment rate led to a drop in GNP in 4/81 at a 5.2 percent annual rate, and according to Business Week (3/1/82) it could be as high or higher in 1/82. The number of business failures in early February was the highest weekly total since the depression (USNWR, 3/1/82). New home sales fell 23 percent in January (ABC Radio News, 3/2/82), and the 16 percent decline in February auto sales marked the worst February in 20 years (CBS Radio News, 3/3/82). The prime interest rate was back to 17 percent on February 17 after having started 1982 at 15.75 percent (USNWR, 3/1/82).

What about the future? The Commerce Department's Index of Leading Indicators fell in January by 0.6%, the ninth straight monthly decline (CBS Radio News, 3/1/82). Some economists even forecast depression if current contractionary monetary policy and expansionary fiscal policy are maintained on their current collision course (CBS' Face the Nation, 2/28/82). However, as mentioned earlier, most economists' outlook is not quite so dismal.

Wyoming's economy continues to fare much better than the nation's. The state's 4/81 unemployment rate was among the best in the nation; nearly four percentage points lower than the national average (see Table 4). However, this does not mean that signs of the national recession are not apparent in the Wyoming data. The impact of recession and high interest rates is clearly evident in the housing (Table 6) and auto sales (Table 8) data. Energy resource output (Table 1) is also down slightly, but seasonality and the numerous holidays during 4/81 may be as significant as the recession in explaining it.

Among the items of national and international news of interest in Wyoming, is the continuing worldwide glut of oil. Conservation, switching to alternative energy resources, and the current recession in most industrialized nations is, according to two sources (*Los Angeles Times*, 2/20/82 and *Business Week*, 2/22/82), threatening the very existence of OPEC. While this is certainly good news for consumers, producers' profits, and some state tax revenue sources could be hard hit. Most threatened are some of the efforts to develop alternative energy sources, the economic viability of which depends on a continued high price of oil.

On March 1 (ABC Radio News), the administration announced its intention not to seek early (before 1985) de-control of natural gas during this session of Congress. However, the Federal Energy Regulatory Commission may administratively double the price of up to 40 percent of U.S. natural gas supplies (*Business Week*, 2/15/82).

The nuclear power industry continues to have its problems. Newly discovered design errors continue to delay the operation of the Diablo Canyon plant, and the Nuclear Regulatory Commission admitted that accidents of the type which occurred recently at a plant in the state of New York are likely to occur elsewhere (CBS Radio News, 3/3/82). Lessons learned from accidents such as Three-Mile Island make take up to ten years to fully implement (*Wall Street Journal*, 2/26/82).

Despite uncertainty about the economy, the park service expects a five percent increase in the number of national park and monument visitors in 1982 compared to 1981 (see pg. 7-8). Since 1981 was nearly a record year for visits, the projected increase is very significant.

Although an economic recovery appears likely by the summer, its magnitude and duration are still very uncertain. The economic events of the next month or two are likely to be the crucial determinants of what economic policies are chosen by the government. If signs of improvement appear quickly, the president's program has a better chance in the congress. If the situation remains the same or worsens, the approach of the November election may prompt the congress to do almost anything that promises quick results.

Spring Minerals Outlook

COAL

by Gary B. Glass, State Geologist, Wyoming Geological Survey

In 1981, Wyoming set yet another production record, at an estimated 110 million tons of coal, and ensured its third place position among the coal-producing states for the second straight year. Quite possibly, Wyoming also now has the two largest coal mines in the nation, as Amax's Belle Ayr mine produced about 15.2 million tons and Thunder Basin's Black Thunder mine produced over 14.5 million tons.

Although the near term outlook for Wyoming's coal isn't as bright as it once was, there is no disputing that annual production will continue to increase. The rate of increase, however, has apparently slackened. To satisfy projected demands, more than 3.7 billion tons of Wyoming coal reserves are already committed to contracts with more than 50 utility companies and more than 26 industrial users located in no less than 26 states.

Production increases over the next several years, however, are due principally to the commencement of older contracts rather than additional new contracts. For example, there were only five new contracts announced in 1981. Obviously, market demand will determine the amount of coal eventually mined from existing and planned mines in Wyoming. Right now, that demand is most dependent on domestic utilities. In the short-run, coal-based synfuels and foreign export markets, though frequently mentioned, do not offer any significant market for the state's coal. Perhaps by the 1990s one or both of these markets will materialize, but that appears only a slight possibility.

Perhaps the best indicator of anticipated market improvement is the interest that the coal industry has shown in upcoming federal lease sales. This interest is in the face of the present soft market for coal and the acknowledged overcapcity that now exists, particularly in the state's Powder River Coal Basin. It is still anyone's guess, however, when the market will start improving.

MINERALS

by W. Dan Hausel, Deputy Director, Wyoming Geological Survey

The spring outlook for the uranium market continued to look dim, with no foreseeable improvement in the market. The U.S. Department of Energy released production statistics for the nation that showed a 13 to 15 percent decline for the 1981 production from its record production high in 1980. Both D.O.E. and Nuexco officials anticipate another drop of 25 percent during 1982.

In Wyoming, the depressed market continued to take its toll on the uranium industry. Exxon Minerals Company, the state's second largest producer, announced that it would discontinue uranium exploration activities, and close its underground mine at the Highland operations, located in the southern Powder River Basin. For 1981, production at the Highland operations remained nearly the same as in 1980 (3 to 3.5 million pounds of yellowcake), although 1982 will show a substantial decrease, with Exxon closing the Buffalo Shaft and scaling down operations at the Highland open pit. During 1982, the Highland mill is scheduled to operate at about one-third capacity.

Diamond exploration looks promising for the Colorado-Wyoming region this spring. With an improvement in the weather just ahead, exploration activity is expected to increase.

The spring should also bring an increase in precious metal exploration activities. Several major exploration firms have committed funds for the exploration of Wyoming's greenstone belts this summer. To date, however, no major discoveries have been announced.

Trona production showed a slight decrease this year, according to the U.S. Bureau of Mines. The drop in trona production results from the nationwide slump in the economy. Texasgulf, Inc. received approval from the Wyoming Industrial Siting Commission to expand its plant near Green River, but decided to indefinitely delay construction because of the market slump.

Increased demand for bentonite by the drilling mud industry resulted in N.L. Industries and the American Colloid Company expanding their production capacities. N.L. Industries opened a new 1,000 ton-per-day bentonite plant near Lovell, and American Colloid increased the production capacity of their Lovell Mill.

OIL AND GAS

by Alan J. Ver Ploeg, Staff Petroleum Geologist Wyoming Geological Survey

Once again, the Overthrust Belt headlines activity in Wyoming. Exxon recently completed the discovery well for the newly named Road Hollow Field in Lincoln County. The discovery is located approximately four miles northeast of production in the Whitney Canyon-Carter Creek complex, and appears to be on trend with that producing structure. Production is from the Ordovician Bighorn Dolomite, at the rate of 10 million cubic feet of gas and 440 barrels of oil per day. This discovery does, however, appear to differ from the majority of the Overthrust discoveries in that the gas is sweet (low hydrogen sulfide).

In a related note, the Amoco gas sweetening plant under construction in Whitney Canyon-Carter Creek Field is nearing completion. The plant will be rated to process 270 million cubic feet of sour (high hydrogen sulfide) gas per day. The estimated cost of the facility will total nearly $310 million upon completion in September of 1982. Gathering lines will be laid in February to connect 17 wells with the plant.

Recently, Frontier Pipeline Company announced plans to construct a 300 mile, 20 inch oil and condensate line from the Overthrust Belt to refineries in Casper. The project is currently in the permitting stage. It is anticipated that oil and condensate production from the Overthrust Belt will exceed the needs of Salt Lake City refineries by 1983. Frontier, owned principally by Amoco Pipeline Co., anticipates commencement of construction by mid-1983.

According to figures recently released by the U.S. Department of Energy, Wyoming led the nation in 1980 in new proved reserves of natural gas, and was no worse than second in additions in oil reserves. Wyoming's proved reserves of gas totaled 9.1 trillion cubic feet, nearly 1.57 trillion cubic feet more than 1979's total. Oil reserves totaled 928 million barrels at the end of 1980, 87 million more than 1979. Of the 50 states, Wyoming ranks seventh in gas reserves and sixth in oil reserves.

Drilling statistics were recently reported by Petroleum Information Corp. for 1981 and are compared with the previous six years in the attached table. The statistics indicate quite a dramatic jump in activity in the state, as total wells and average active rig totals are up significantly.

Wyoming Drilling Summary

	Exploratory Wells			Development Wells				Average Active Rotary Rigs	Average Depth
	Oil	Gas	Dry	Oil	Gas	Dry	Totals		
1975	61	75	376	550	46	194	1256	107	7114
1976	48	21	330	383	60	136	978	86	7144
1977	48	53	361	550	96	169	1277	120	7332
1978	49	35	444	561	127	151	1367	137	7000
1979	45	54	401	586	185	214	1385	147	6787
1980	52	50	305	539	198	227	1371	155	7667
1981	76	43	471	680	179	275	1724	190	7174

Source: Petroleum Information Corporation

Spring Agricultural Outlook

by Robert D. Carver
University of Wyoming

Uncertainty in the domestic and world economies cloud the current agricultural outlook. On the U.S. scene, consumer incomes, a major component of demand, have declined in real terms since 1979, and thus has had a major impact on the demand for meats. Domestic grain prices are influenced heavily by international trade; and high interest rates, a stronger U.S. currency and continued global tension have weighed heavily on these markets.

LIVESTOCK

The U.S.D.A. January 1, 1982, cattle inventory report indicated a 1 percent increase in total cattle numbers over the year previous. This marked the third year of increasing numbers for the current cattle cycle. Beef cow numbers were up 2 percent, and producers indicated that they were intending to hold 8 percent more heifers for beef cow replacement than they were a year earlier. Although the reported 1981 calf crop was down slightly, the increased number of cows set the stage for greater beef production over the few years.

Available supplies of feeder cattle outside of feedlots on January were up 2 percent from last year. Although U.S.D.A. reported the total inventory of calves and yearlings on all farms and ranches were slightly below last year's level, significant reductions in the number of cattle on feed resulted in the increased supply. This pool of available feeder cattle will either be placed on feed sometime this year or slaughtered as nonfed steers or heifers.

Net placements of cattle and calves on feed during January were 1.3 million head. This was an increase of 18 percent from last year and 17 percent from 2 years ago. This surge in early 1st quarter placements was partially the result of winter weather patterns that forced cattle from winter wheat and crop residue pastures. Other contributing factors were that cattle feeders began to show some profits in January, for the first time in several months, and some price strengthening of fed markets.

Demand for meat, and in particular beef, in 1982 will be tied very closely to improvements in the economy. Demand is influenced by several factors such as consumer tastes and preferences, the price and availability of other types of meat, and consumer disposable incomes. The most important of the factors is consumer income.

Real consumer incomes (income adjusted for inflation) are still below the levels of 1979. Even under the most optimistic projections, it likely will be late 1982 or early 1983 before consumer incomes return to 1979 levels. Consequently, the demand and, ultimately, the price of meat this year will be influenced to a large degree by factors outside the control of livestock producers.

Prices for all cattle improved somewhat in January and February in the face of relatively high cattle slaughter and fed cattle marketings. Feeder cattle prices should show some strength as we move towards green grass time this spring. Weather will continue to play a role in this market throughout the spring and summer, however.

GRAINS

A slump in U.S. grain exports this winter, following a record 8.2 billion bushel corn crop and a record 2.79 billion bushel wheat crop in 1981, has reduced any price strength in the grains area. Foreign sales and shipments of U.S. feed grains are running 15 percent behind last year at this time.

This reduction in grain exports has occurred for many reasons. The strengthening of the dollar relative to gold has made U.S. grain more expensive than in recent years. Rising interest rates worldwide have discouraged grain dealers from building inventories. Rising debt in many nations have forced governments to devote more cash to debt payments and less to food imports.

Another factor that has contributed to the export slump is the belief by some importing countries that the U.S. is willing to use trade restrictions as a political tool. History supports that belief, as the U.S. has used trade restrictions in the form of suspended shipments, embargoes, or postponement of grain sales contract negotiations three times in the past six years. The outcome of these actions has been to discourage importing countries from relying on the U.S. for their grain needs.

The outlook for improved grain prices this spring will hinge on improved export markets, southern hemisphere crops, and weather conditions as we move into planting time.

Wyoming Travel/Tourism Forecast for 1982

by Ernie Over
Wyoming Travel Commission

What will 1982 hold for Wyoming's travel and tourism industry? To provide an insight into this question, three areas must be addressed: Wyoming's travel history, recent travel trends and the state of the national economy.

WYOMING'S TRAVEL HISTORY

The history of Wyoming's travel industry is one of dependence on wheeled vehicles. Because Wyoming's prime destination areas are not served on a consistent basis by either airlines or the railroads, automobiles and recreational vehicles have been and will continue to be the major form of moving travelers. Over 90 percent of all of Wyoming's visitors come to the state via the highways.

Wyoming's traditional appeal is one of a high quality, family, outdoor, recreation-oriented vacation experience. With Wyoming's frontier history, the influence of the cowboy, and the fact the state is blessed with an abundance of natural wonders and low population, the opportunity to see America as it once was is overriding. Middle and upper income families from major metropolitan or heavily populated areas primarily in the midwestern states and southern California area have made up the traditional tourist profile.

The state's northwest corner, the home of Yellowstone and Grand Teton National parks, is the favorite destination of travelers, but because of Wyoming's large size and varied attractions, many visitors are repeat vacationers who travel to different areas of the state each year. Also popular as vacation attractions are the more than 100 dude or guest ranches in and along the seven national forests within the state.

Regional or adjacent states' visitors and in-state residents are the main users of Wyoming's nine state parks and such other recreational areas as Alcova Lake, Bighorn Canyon and Flaming Gorge National Recreational Area.

Tourism is important to the state, ranking among the top three industries annually. The United States Travel Data Center ranks Wyoming fourth among the 50 states in the percentage of jobs generated by the travel industry compared to other nonagricultural industries. In 1979, the year of that report, Wyoming's tourism employment was 20,700. Travel was reported to be the number one generator of nonagricultural jobs in the state with travel, providing 10.3 percent of the nonagricultural payroll. The industry contributed total expenditures in 1979 (excluding foreign travel) of $607.8 million.

Wyoming's tourism advertising has always been targeted at the middle to higher income families up to 1,500 miles from the state's borders. In 1981, an examination of the advertising response from the first quarter of that year revealed that the midwestern farm belt, led by Illinois, Wisconsin and Minnesota, continued to be the top generator of inquiries. The eastern states were second in the compilation, led by New York, Pennsylvania and New Jersey. The south, led by Texas and Florida, was third followed by the Pacific Coast states and the mountain states. The response from foreign countries was led by Germany and the United Kingdom.

That same study disclosed that over 38 percent of the travelers receiving Wyoming's tourist information actually made a vacation trip to the state. Per party expenditures were pegged at $515.

RECENT TRAVEL TRENDS

The state of the national economy and the gasoline shortage of 1979 combined to drastically alter the traditional travel patterns established in the late 1960s and for most of the 1970s. Before Americans knew about OPEC, a traditional vacation included two weeks in a car with the family, seeing as many sights in as many different states as they could. But when the gasoline shortage and resulting price increases hit, families began to do better planning, searching for top quality vacations where their dollars and time could be better utilized. Such travel is **termed destinational travel. Destination sites where a family could partake** in many varied activities suddenly became very popular.

Dependence on the automobile as the major carrier of vacation families grew as airline fares increased and more domestic vacations were scheduled.

In Wyoming, new trends in travel included an expanded commercial market as the state's energy boom continued to build, especially in northeast and southwest areas. The state is also seeing more travel by foreigners than ever before, opening up an entirely new market. In addition, the popularity of camping--including the usage of recreational vehicles--has been increasing. 1981 was a banner year for most campgrounds, with a majority of the increase noted in the national forests and adjacent areas. Wyoming's travel industry suffered less during the "bad" travel year of 1979 than did the industries in the surrounding states. The recovery from '79 has also been more dramatic than that of our neighbors, with real-dollar touristic spending approaching 1978 record levels in 1980 and again in 1981. A consistent and effective statewide marketing program supported by increased and enthusiastic community-level advertising and promotion have served to attract visitors to the state even in bad times, and will continue to be productive as nationwide economic conditions improve.

NATIONAL ECONOMIC FACTORS

Although the travel industry has been considered "recession proof" in years past, recurring recessions, short recoveries and continuing double-digit inflation are beginning to have an unfavorable effect on the industry as a whole, reports the U.S. Travel Data Center. Whereas the American consumer can shake off the discouraging effects of occasional adversity, continued economic stress has worn this resistance down.

In the face of such bleak economic developments, it is a wonder that Americans are still traveling and traveling more. During 1981, Wyoming attractions registered large gains in the numbers of visitors over the 1980 travel year, led by Yellowstone's increase of nearly 25 percent to pre-1979 levels of 2.5 million visitors.

So how is the consumer managing all this travel? The answer lies in compromise or adjustments being made in vacation planning. These changes allow additional travel while keeping the costs within strained budgets. They include less air travel, less foreign travel by Americans, plus more highway traffic and more nights spent with friends and relatives.

The consumer's financial ability to absorb travel price increases during a recession varies directly with income. Americans with family income greater than $30,000 increased their vacation trips during 1981, while those in lower income brackets showed virtually no increase at all.

Many in the industry are predicting the recession to continue through the first two quarters of 1982, with a recovery noted by mid-year--the beginning of the peak travel season. Already the first decline in the "Travel Price Index" published by the Travel Data Center has been noted, the first such decline in seven years.

Another cause for optimism is the increased importance of the foreign traveler, who flocked to this country in all-time record numbers last year.. The United States Department of Commerce says the number of foreign visitors last year, for the first time, exceeded the number of Americans traveling abroad. This trend is expected to continue in 1982.

CONCLUSIONS

What does all this mean? Several things. If gasoline remains readily available with a stablized price, and if the national economic turnaround occurs at mid-year as some economists are predicting, Wyoming should have a good tourism year.

The state is fortunate in that many destination-type activities already exist in and around our prime vacation areas. Since 1979, both the state and many local communities have increased their marketing efforts, making the state very visible in the highly competitive travel marketplace. In addition, Travel Commission efforts overseas will begin paying benefits. Over the past three years, Wyoming has been represented at major travel functions in Australia-New Zealand, West Germany, and the United Kingdom. The Old West Region (including Wyoming) has also done extensive marketing in the European community and the increased visibility of the region as a whole will benefit Wyoming.

Since 1980, Wyoming has noted a tremendous increase in the numbers of bus tours entering the state. This lucrative market is "discovering" not only Wyoming's physical attractions, but recent improvements and expansions in the state's lodging industry. The combination of the two make Wyoming an attractive vacation package for these tours.

The increase in commercial traffic will also be a positive factor-especially in the central and northeast sections. The private sector has banded together to promote Wyoming's convention and business meeting opportunities, and this new effort should have positive results where major meeting facilities exist. The addition of new facilities to handle such meetings will also be an asset, with major new centers opening this year in Casper and Laramie.

Although still not considered a factor in vacation travel, airline arrivals in Wyoming will be aided with the addition of major jet services at several Wyoming communities this spring and with increased promotional efforts in other cities now served with major carriers.

The state is also joining Montana and the Old West Trail states in new marketing programs to reach new travel markets, and this spring will be joining the Foremost West states (Colorado, New Mexico, Arizona, Utah and Nevada) in a cooperative marketplace to boost the region's identity.

Wyoming's travel industry seems to be doing what will be necessary to capture its share of the vacation market. If the national economy improves during the first few months of 1982, the forecast is favorable.

The National Park Service in Wyoming, 1982

by L. Lorraine Mintzmyer,
Regional Director of the National Park Service
Rocky Mountain Region

Since the idea of a national park became a reality in Wyoming more than a century ago, our country has changed a great deal. Although the national park idea has remained constant, its priorities and methods of operation have been modified to accommodate these changes.

When Yellowstone was first set aside, it was protected from those who would exploit it. There was fear that various entreprenuers would degrade, destroy or hold captive the very resources so uniquely offered by nature. Federal protection, in the form of the U.S. Army, was posted to keep the peace between man and nature.

In 1916, under the auspicies of the Department of the Interior, the National Park Service was founded. As the nation's steward, it was to preserve and protect for all America, the country's natural, historic and cultural heritage.

The National Park Service's beginnings were small, affording hardly more direction or funding than was necessary to meet the most basic requirement. Park managers were there to thwart poaching, trespassing, and meet the small but elite number of visitors.

With the popularization of the automobile, more visitors arrived at National Parks by the thousands, and they brought new demands. To guide, feed and lodge them, necessary facilities became more numerous and more sophisticated. Water, sewer and solid waste systems became larger and more elaborate. As the National Park Service grew in size and purpose, it rose to meet the new challenges.

During the last 20 years, the National Park Service has doubled in size. It now contains more than 330 natural, cultural and historic areas, and embraces a total or more than 81.5 million acres.

With consideration for maintenance alone, this is an enormous responsibility. The National Park Service is charged with responsibility for about 8,000 miles of roads, 1,200 bridges, 1,100 water systems, 92 major sewage treatment systems and more than 11,000 buildings. Yellowstone alone has about 1,800 buildings and 600 miles of roads.

In its 66 years, the National Park Service has become tremendously popular. Last year, 330 million people visited the nation's park areas. Eight million of those toured the seven National Park areas located in Wyoming.

Visitation on a park-by-park basis to those areas last year was: Big Horn Canyon National Recreation Area, 371,982; Devils Tower National Monument 300,308; Fort Laramie National Historic Site 121,577; Fossil Butte National Monument 12,921; Grand Teton National Park, 3,598,454; John D. Rockefeller Jr. Memorial Parkway, 1,515,176; and Yellowstone National Park, 2,549,307. Most of the visits were concentrated during the summer months. Early and conservative estimates project a five percent increase in visitation during 1982.

This popularity has taken a toll on our parklands. The parks and their facilities cannot help absorbing damaging impacts through use.

From a growing concern for the condition of the national parks, the federal government's General Accounting Office released a study in 1980 that identified fire, health and safety needs throughout the National Park System. Their estimated cost to bring facilities and services to standard was $1.6 billion. This estimate came at a time when, by comparison, the National Park Service's construction budget amounted to $43 million, including the cost of constructing or rehabilitating myriad water and sewer treatment facilities, bridges, buildings, roads and support facilities.

National Park Service areas in the Rocky Mountain Region will receive an additional $18.6 million during this fiscal year as part of a program that is designed to restore and rehabilitate visitor use facilities in the parks. This effort, known as the Park Restoration and Improvement Program, was initiated by the Secretary of the Interior.

In all, about $76.3 million was authorized by the Congress for use in specially identified projects throughout the National Park System. These funds are over and above continuing appropriations for operations, construction and cyclic maintenance in the parks.

The program embraces a wide range of projects, including improved water and sewage systems, bridge rehabilitation, fire protection in buildings, rehabilitation of dilapidated historic structures and similar works.

Funds are earmarked in four program areas: health and safety, capital improvement, cyclic maintenance and repair, and rehabilitation and cultural resource preservation. Of the $18.6 million available to the 41-area Rocky Mountain Region, $4.5 million will be applied to health and safety projects; $5.2 million to capital improvements; and $8.9 million for cyclic maintenance and repair and rehabilitation.

During the current 1982 fiscal year, counting routine maintenance as well as the Park Restoration and Improvement program, more than $14 million will be spent on improvements at Yellowstone alone. In the Mammoth area, the water system is scheduled for reconstruction. A water treatment system will be constructed in the Canyon development area. Some concession facilities purchased from the Yellowstone Park Company in 1979 will also be rehabilitated.

Substantial amounts will also be spent at the other park areas in Wyoming. Fort Laramie National Historic Site is scheduled for stabilization work on its historic buildings. Devil's Tower, the country's first national monument, is due for some water system rehabilitation and roofing work.

During the next year, roads at Fossil Butte National Monument will be improved. Big Horn Canyon National Recreational Area is scheduled for an assortment of improvements which range from work on fencing to rehabilitation of boat docks and a sewage system.

Grand Teton National Park will place special emphasis on several maintenance tasks this year, including rehabilitation of trails and bridges, stabilization of some of its historic buildings, and improvements of its water and sewer systems.

For the 1983 budget, the Park Service has requested nearly $7.5 million to rehabilitate additional concession facilities at Yellowstone. More than $5 million is also being sought for improvement at Grand Teton. It is proposed that the money be used to improve water systems, rebuild roads and upgrade day use facilities.

Format

For data available at least quarterly, the last 12 quarters are printed in WQU. In this edition, published series begin with the 1st quarter of 1979, and end with the 4th quarter of 1981. For other data series (primarily annual), the most recent observations, up to 12, are published in WQU. Most annual data series will reappear in WQU only when updated, or about every fourth issue. Quarters are calendar quarters. For example, the 3rd quarter is composed of July, August, and September. In the table headings and narratives, a particular quarter will be indicated by notation such as 2/80 (2nd quarter, 1980), 1/79 (1st quarter, 1979), and so on.

Beside each data series name is a two-digit number in parentheses. The number is a data value units (such as dollars, tons, feet, miles, etc.) code. The key to the units code follows the last data page. Following the units code page is a bibliography of data sources, listed by WQU page number of the data.

Throughout WQU, all data are for the state unless otherwise stated. The most recent year's data should be viewed as preliminary, due to revisions. The acronymn "INA" signifies that information is not available. Some graphics are used to illustrate trends. When more than one trend line appears on a graph, the line will be labeled with a number which matches the number of a data series on the accompanying table.

The reader should be attentive to the footnotes at the bottom of pages, particularly those accompanying a data table. The footnotes help the reader to properly interpret the data, and they also indicate when more detailed (by subject or by area) data than that which is shown is available from IPR.

Figure 1: Energy and Mineral Production

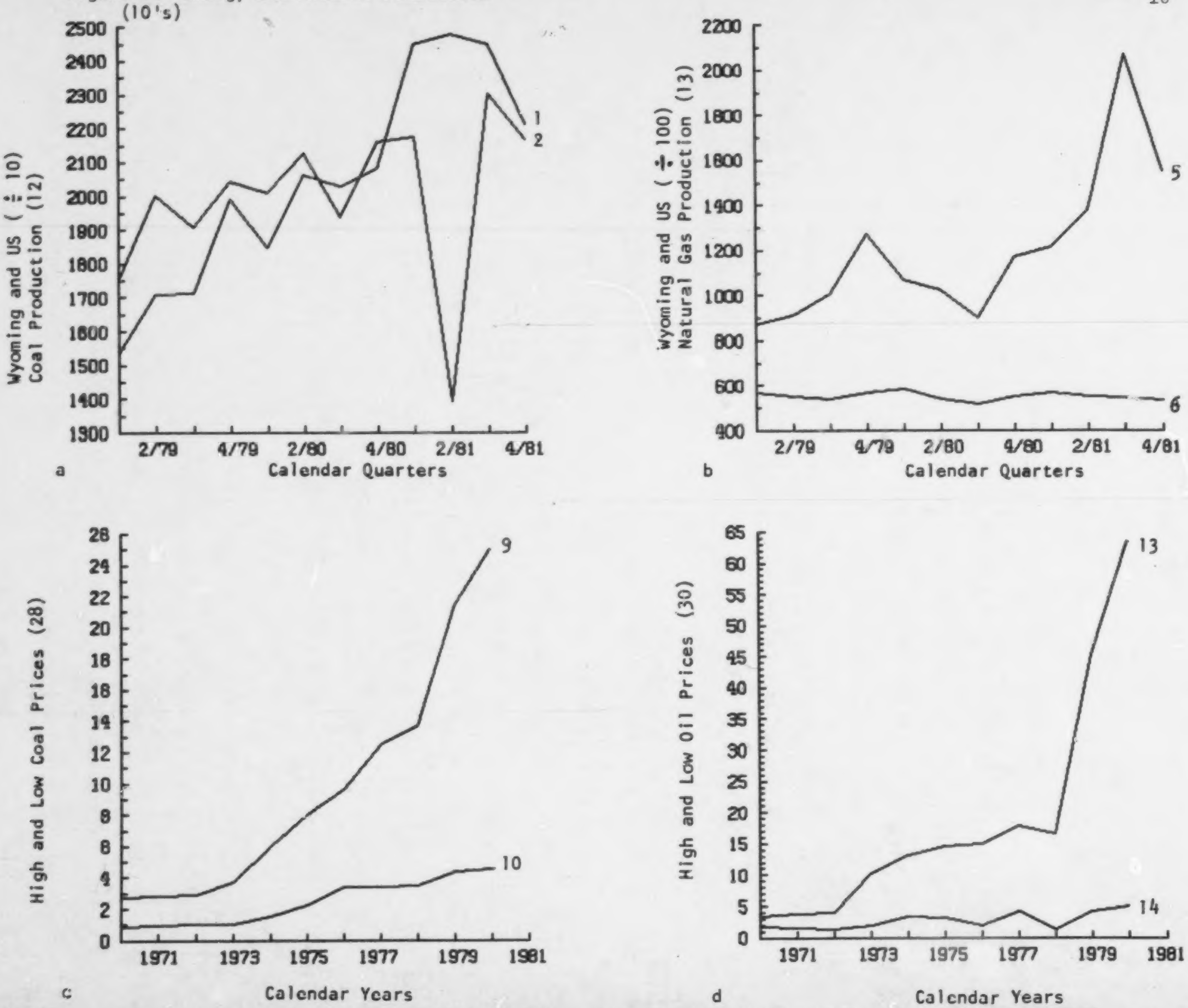

Table 1: Energy and Mineral Production[1]

Calendar Quarters	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81
1. Wyoming Coal (12)	15349.	17073.	17119.	19897.	18487.	20630.	20297.	20799.	24484.	24796.	24495.	22109.
2. U.S. Coal (12)	175608.	200109.	190780.	204300.	200763.	212651.[2]	193760.	216015.	217465.	139510.[2]	230205.	216580.
3. Wyoming Oil (14)	360.	357.	328.	313.	346	349.[2]	354.	361.	351.	364.[2]	374.	362.
4. U.S. Oil (14)	8543.	8500.	8495.	8600.	8676.	8629.[2]	8565.	8554.	8565.	8526.[2]	8521.	8400.[3]
5. Wyoming Natural Gas (13)	874.	911.	1006.	1273.	1071.	1028.	901.	1174.	1219.	1378.	2073.	1552.[3]
6. U.S. Natural Gas (13)	56830.	55328.	54114.	57087.	58381.	54300.	51777.	55344.	56740.	55356.	54880.	53631.[3]

Calendar Quarters[4]	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
7. High Price Bentonite (28)	1.30	I.N.A.	1.40	2.16	1.92	2.17	2.30	3.00	3.27	3.64	4.55	I.N.A.
8. Low Price Bentonite (28)	1.30	I.N.A.	1.20	1.18	1.25	1.66	1.70	1.79	2.20	2.76	2.18	I.N.A.
9. High Price Coal (28)	2.70	I.N.A.	2.88	3.68	6.02	8.05	9.65	12.50	13.70	21.45	25.20	I.N.A.
10. Low Price Coal (28)	.83	I.N.A.	1.02	1.02	1.53	2.25	3.40	3.40	3.50	4.35	4.50	I.N.A.
11. High Price Gas (29)	.69	I.N.A.	.53	.59	1.33	3.23	3.76	6.01	6.07	25.36	46.66	I.N.A.
12. Low Price Gas (29)	.02	I.N.A.	.05	.04	.04	.05	.04	.05	.03	.04	.07	I.N.A.
13. High Price Oil (30)	3.44	I.N.A.	4.04	10.31	13.07	14.53	14.94	17.88	16.66	56.32	63.57	I.N.A.
14. Low Price Oil (30)	1.68	I.N.A.	1.33	1.97	3.36	3.09	1.91	4.25	1.42	4.19	5.09	I.N.A.
15. High Price Trona (28)	3.87	I.N.A.	3.50	3.78	4.75	6.00	7.00	7.70	8.00	9.25	11.90	I.N.A.
16. Low Price Trona (28)	3.87	I.N.A.	3.50	3.78	4.75	6.00	7.00	7.70	8.00	9.25	10.95	I.N.A.
17. High Price Uranium (28)	38.43	I.N.A.	24.42	15.15	14.07	14.18	29.43	34.21	22.01	36.67	25.00	I.N.A.
18. Low Price Uranium (28)	.07	I.N.A.	.02	3.11	2.13	2.69	1.53	.67	.528	5.23	3.82	I.N.A.

Both Wyoming and U.S. Coal production declined in 4/81, with Wyoming production down 9.7 percent and U.S. production down 5.9 percent from 3/81. Most of the drop in coal production is due to decreases during the weeks which included Christmas and New Year's Day. The production figures for the first few weeks of 1982 are back to pre-Christmas levels. Despite the recent declines, 4/81 production is up over 4/80 production. In Wyoming it is up 6.3 percent while nationwide it is up only .26 percent (Graph A). Wyoming and U.S. Oil production show declines of 3.2 percent and 1.4 percent respectively in 4/81 from 3/81. The decline experienced from 4/80 to 4/81 is .27 percent and 1.8 percent respectively. Natural gas production changes are mixed with Wyoming production up 32.2 percent from 4/80 levels and U.S. production down 3.1 percent.

While production levels may fluctuate up or down, valuations of minerals have only gone up. Natural gas values lead the way with the 1980 high more than 65 times the 1970 high. Other big increases include: Bentonite up 3 times, coal up 9.3 times, oil up 18.48 times and trona up 3 times. The prices are approximations made by the Department of Revenue and Taxation. The price determination involves dividing total gross valuation (assessed at 100 percent of value) of output by total gross output.

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[1] First time readers of WQU should refer to page nine ("Format") for an explanation of numerical codes and table formats.

[2] Datum shown is an estimate. Some data components were not received.

[3] Preliminary. Only October's production data were available.

[4] Following data do not include state and federal lands production. Taxable production only is shown. Highest and lowest prices indicate the range among Wyoming firms.

Figure 2: Agriculture

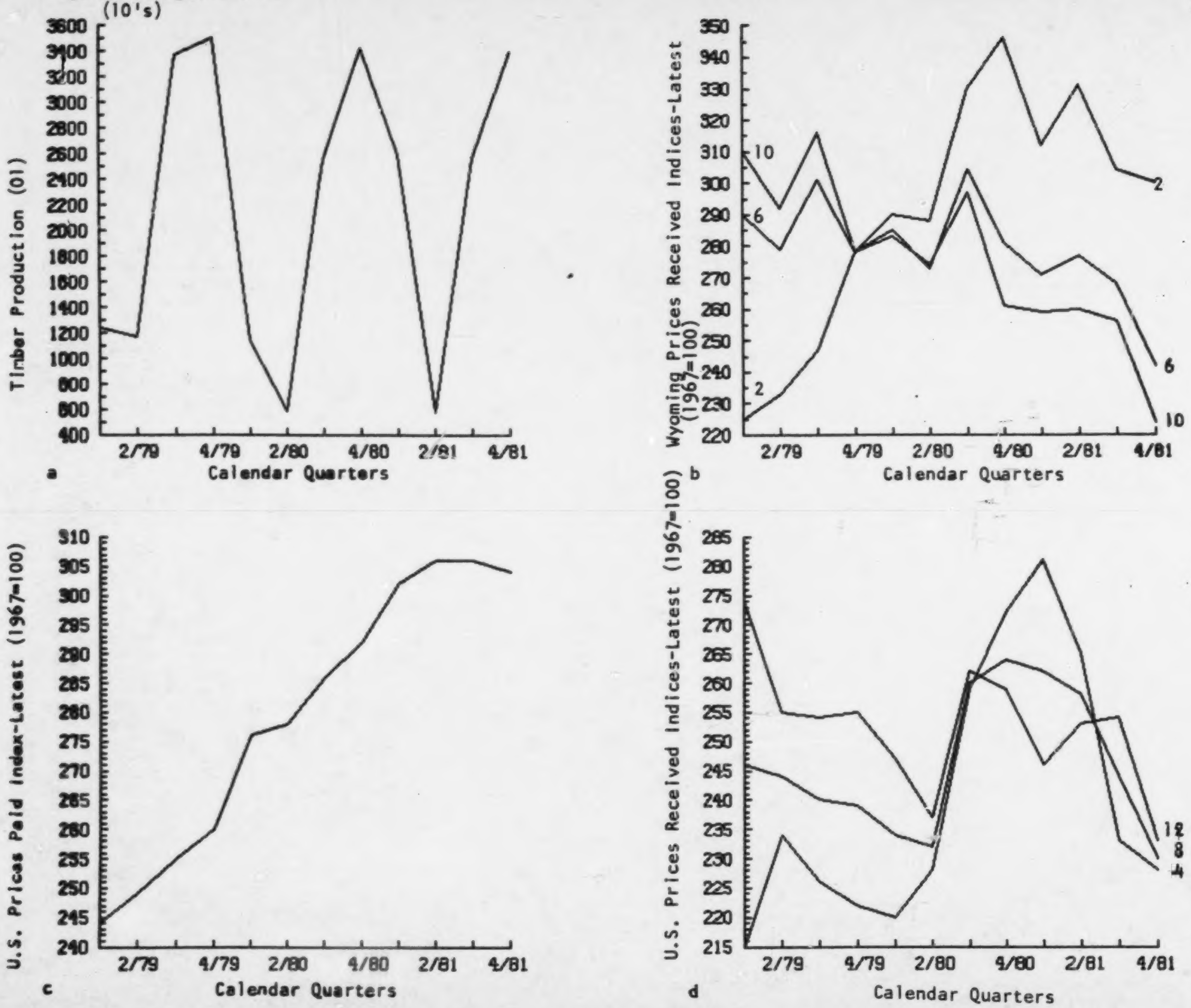

Table 2: Agriculture

Calendar Quarters	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81
1. Timber Cut in Wyoming National Forest[1]	12444.	11712.	33745.	35043.	11372.	5866.	25538.	34190.	25895.	5810.	25613.	33929.
Price Indicies[2] (1967 = 100)												
2. Wyoming Crops, Prices Received - Latest	225.	233.	247.	278.	290.	288.	330.	346.	312.	331.	304.	300.
3. Wyoming Crops, Prices Received - Average	218.	224.	246.	259.	279.	282.	308.	316.	315.	322.	302.	300.
4. U.S. Crops, Prices Received - Average	215.	234.	226.	222.	220.	228.	259.	272.	281.	265.	233.	228.
5. U.S. Crops, Prices Received - Average	213.	222.	233.	224.	221.	222.	251.	267.	278.	272.	249.	245.
6. Wyoming All Commodities, Prices Received - Latest	290.	279.	301.	278.	285.	273.	304.	281.	271.	277.	268.	242.
7. Wyoming, All Commodities Prices Received - Average	278.	293.	284.	281.	281.	273.	285.	281.	269.	277.	265.	250.
8. U.S., All Commodities, Prices Received - Latest	246.	244.	240.	239.	234.	232.	260.	264.	262.	258.	244.	230.
9. U.S., All Commodities, Prices Received - Average	240.	245.	241.	238.	237.	229.	255.	263.	263.	260.	251.	234.
10. Wyoming Livestock, Prices Received - Latest	310.	292.	316.	278.	283.	274.	297.	261.	259.	260.	256.	224.
11. Wyoming Livestock, Prices Received - Average	296.	314.	295.	288.	282.	272.	282.	274.	255.	264.	254.	235.
12. U.S. Livestock, Prices Received - Latest	274.	255.	254.	255.	247.	237.	262.	259.	246.	253.	254.	233.
13. U.S. Livestock, Prices Received - Average	264.	266.	248.	251.	251.	234.	259.	261.	250.	250.	254.	240.
14. Prices Paid by U.S. Farmers - Latest	244.	249.	255.	260.	276.	278.	286.	292.	302.	306.	306.	304.
15. Prices Paid by U.S. Farmers - Average	239.	248.	253.	258.	273.	276.	284.	291.	300.	305.	306.	305.

Timber production (Graph A) exhibited its expected fourth quarter surge in 1981. The end result, however, was the second consecutive fourth quarter with a slight decline in production. 4/81 production was down .76 percent from 4/80 and down 3.18 percent from 4/79.

Prices received by Wyoming ranchers and farmers (Graph B) have been in general decline since 3/80 with 4/81 showing a sharp drop. Nationwide ranchers and farmers have done no better with a similar decline in prices received since 4/80 plaguing the agriculture industry. These declining prices are being reflected belatedly by a slight decline in costs to the farmers and ranchers (Graph C). Although the decline in costs in no way offsets the decreased prices received by farmers and ranchers it must be considered good news for the agriculture industry.

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[1] Series revised since last update

[2] The index for the last month (latest) of each quarter, along with the average of the three monthly indices of each quarter.

Figure 3: Tourism

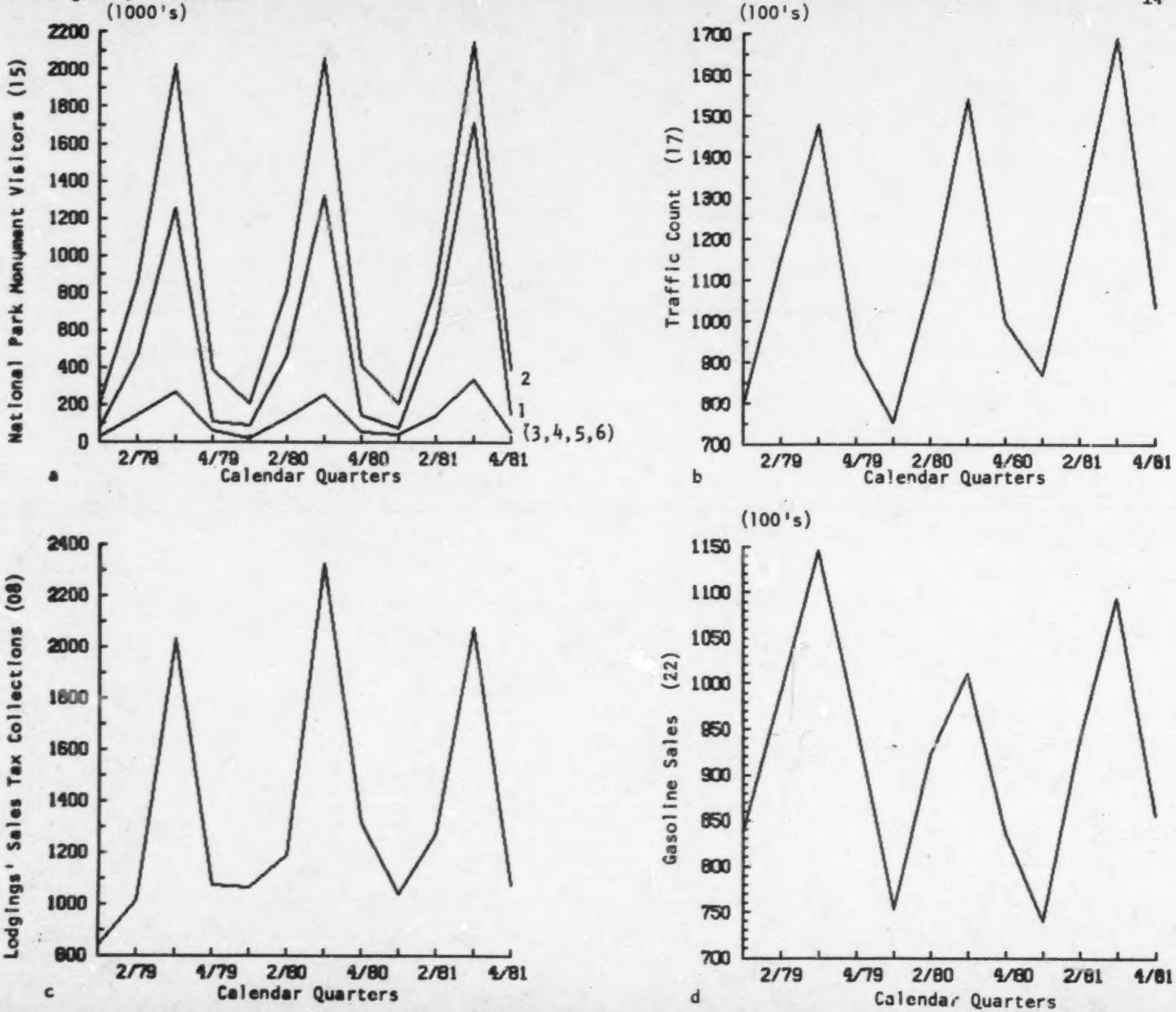

Table 3: Tourism

Calendar Quarters	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81
National Parks and Monuments												
1. Yellowstone (15)	73925.	458095.	1251088.	112061.	89609.	459974.	1323837.	144039.	74693.	609642.	1715175.	149682.
2. Grand Teton (15)	199191.	854618.	2023084.	389457.	205415.	814813.	2055989.	412817.	206147.	847464.	2147775.	393843.
3. Devil's Tower (15)	8499.	65754.	140701.	12606.	7600.	51992.	144042.	12346.	13425.	63064.	205660.	18159.
4. Fossil Butte (15)	78.	3612.	6984.	1404.	91.	2864.	6857.	1421.	339.	3795.	7769.	1018.
5. Fort Laramie (15)	5294.	29733.	64685.	7236.	3630.	27621.	52608.	6337.	6309.	40192.	64598.	10190.
6. Big Horn[1] NRA-South (15)	16433.	44483.	54125.	37334.	10564.	45481.	49499.	35422.	18509.	34846.	56566.	27820.
Other Tourism Indicators												
7. Traffic County (17)	79446.	115056.	147903.	92168.	75203.	109530.	154224.	99772.	86957.	125992.	169095.	103438.
8. Hotel, Motel, and Camp Sales Tax (8)	839.	1015.	2031.	1074.	1064.	1189.	2326.	1315.	1036.	1272.	2073.	1528.[2]
9. Gasoline Sales (22)	83787.	98986.	114513.	95742.	75338.	92212.	101005.	83626.	74027.	93721.	109335.	85587.[3]

Tourism data indicate the usual seasonal downturn from the third to the fourth quarter of the year. However, four of the six park service attractions had more visitors in 4/81 than in 4/80. Only Grand Teton (-4.6 percent) and Big Horn Canyon (-21.5 percent) had fewer visitors in 4/81 than in 4/80. However, the number of visitors is relatively small during the fourth quarter, and differences between visitation of one fourth quarter and another is more likely to be due to differences in the weather than any economic factor.

The 4/81 traffic count, lodgings' tax collections, and gallons of gasoline sold are also up; 3.7, 16.2, and 2.3 percent respectively over 4/80. The 16.2 percent increase in lodgings' sales tax collections is 10.1 percentage points higher than the 6.1 percent inflation rate prevailing in Wyoming during that period.

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[1] Big Horn Canyon N.R.A. is only partially in Wyoming. Only visitation data for the Wyoming part is shown.
[2] Estimated from October and November data.
[3] Estimated from October data.

Figure 4: Employment and Labor
(100's)

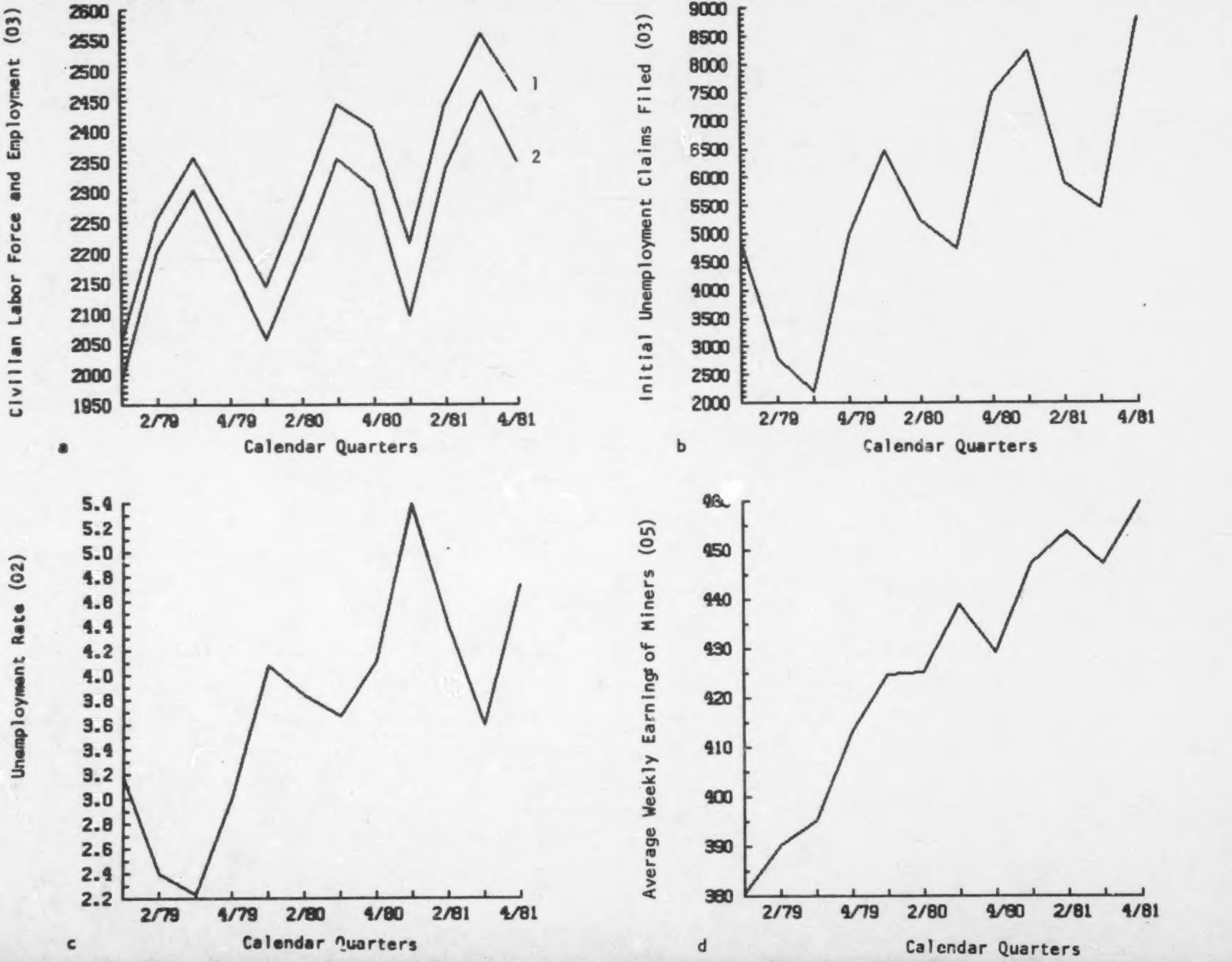

Table 4: Employment and Labor[1]

Calendar Quarters	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81.
1. Civilian Labor Force (03)	205450.	225584.	235587.	225379.	214579.	228869.	244355.	240566.	221590.	244466.	255947.	246690.
2. Employment (03)	198922.	220174.	230334.	218571.	205831.	220080.	235404.	230685.	209641.	233690.	246745.	235036.
3. Unemployment (03)	6529.	5411.	5253.	6809.	8748.	8789.	8951.	9881.	11949.	10776.	9202.	11654.
4. Unemployment Rate (02)	3.2	2.4	2.2	3.0	4.1	3.8	3.7	4.1	5.4	4.4	3.6	4.7
5. Initial Claims Filed (03)	4850.	2790.	2200.	4977.	6466.	5242.	4745.	7494.	8231.	5901.	5463.	8837.
6. Applications Recvd. (03)	9839.	11653.	10667.	8300.[2]	10263.	12481.	12727.	9584.	13026.	13522.	13884.	10000.[3]
7. New Non-Ag Openings (03)	9028.	12210.	13513.	9000.[2]	7126.	9217.	11068.	7526.	6912.	9903.	12991.	6300.[3]
8. New Non-Ag Placements (03)	7271.	10099.	10655.	8100.[2]	6211.	7848.	9218.	6482.	5649.	7681.	10072.	5850.[3]
9. Miner's Avg. Weekly Hours	43.4	42.9	43.4	43.7	42.7	42.9	44.1	43.3	43.8	42.8	41.5	42.5
10. Miner's Avg. Weekly Pay (05)	380.32	390.12	395.23	413.16	424.77	425.31	438.97	429.26	447.17	453.75	447.13	459.64
11. Miner's Avg. Hrly Wage (05)	8.77	9.09	9.10	9.45	9.94	9.91	9.95	9.91	10.22	10.61	10.78	10.81

The civilian labor force and total employment in Wyoming continued their matching seasonal trends. The labor force is up 2.54 percent in 4/81 over 4/80 while total employment is up 1.88 percent. Put together, this results in a 17.94 percent (not percentage point) increase in unemployment in Wyoming in 4/81 compared to 4/80. The increase in unemployment corresponds to an almost equivalent increase of 17.92 percent in the number of new unemployment claims in 4/81 or compared to 4/80. Unfortunately, although there are more job seekers, the number of new listings is estimated by IPR to have declined 16.29 percent in 4/81 as compared to 4/80. Even those who are working feel the economic decline. Miner's average weekly hours were lower in 4/81 than in 4/80. This is the third consecutive quarter that the average work week has been shorter in 1981 than in 1980. Wages for miners were up in 4/81 over 4/80 despite the decline in hours worked. This is due to a 9.1 percent increase in the hourly rate received in 4/81 with respective to the rate paid in 4/80.

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[1] The most recent year's data are preliminary.

[2] Estimated. October 1979 data are not available.

[3] Estimated. October and November 1981 data are not available.

Figure 5: Business Conditions

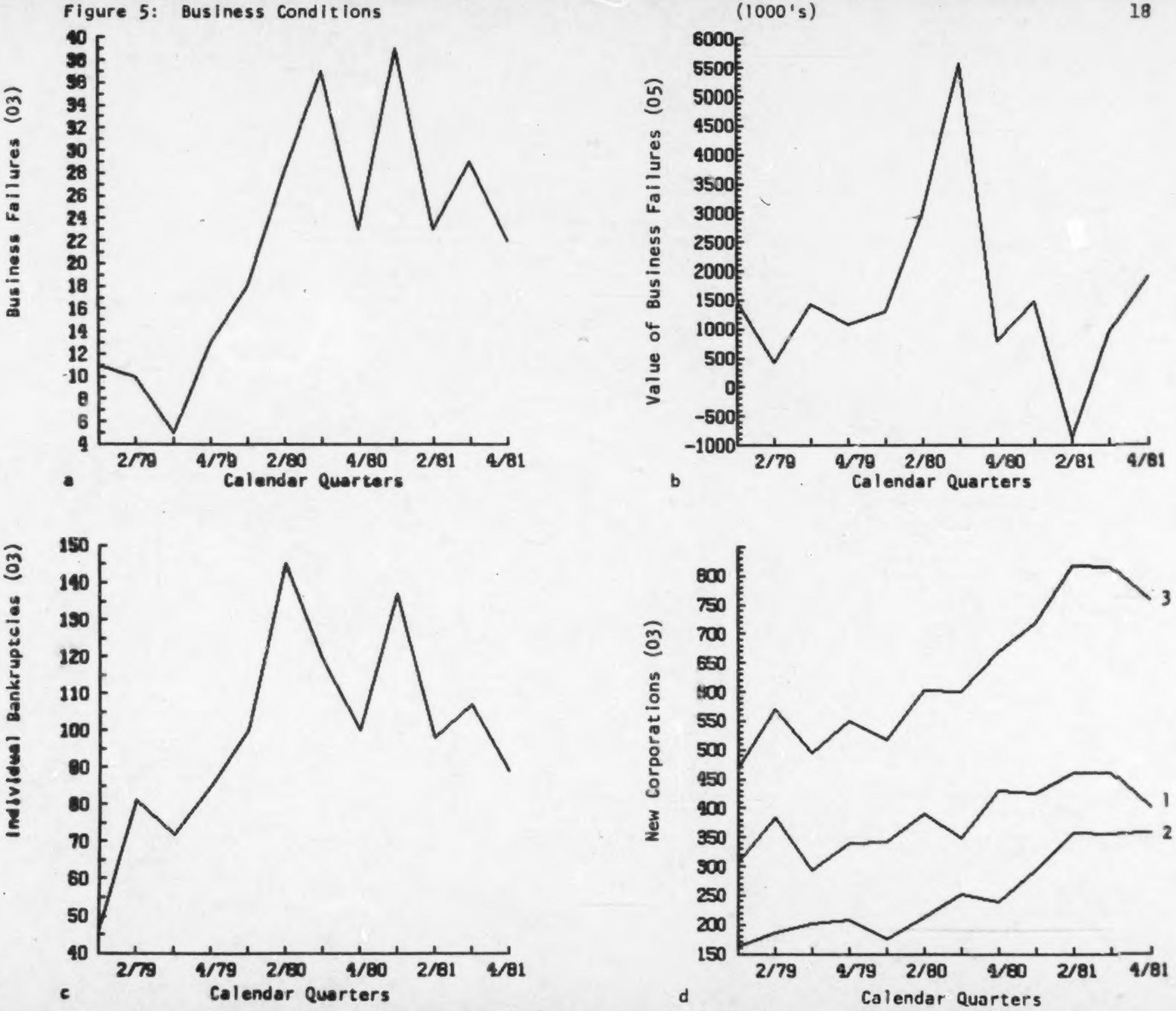

Table 5: Business Conditions

Calendar Quarters	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81
1. New Domestic Corp (03)	306.	383.	294.	340.	342.	391.	348.	429.	424.	459.	459.	400.
2. New Foreign Corp (03)	162.	186.	201.	209.	175.	212.	252.	239.	294.	357.	356.	358.
3. Total New Corp (03)	468.	569.	495.	549.	517.	603.	600.	668.	718.	816.	815.	758.
4. Business Failures (03)	11.	10.	5.	13.	18.	28.	37.	23.	39.	23.	29.	22.
5. Value of Business Failures (05)	1471387.	419868.	1429461.	1079393.	1307881.	2985150.	5565342.	799288.	1474498.	-858446.[1]	950251.	1891422.
6. Personal Bankruptcies (03)	46.	81.	72.	85.	100.	145.	119.	100.	137.	98.	107.	89.

While the number of business failures in 4/81 is down slightly from 3/81 (by seven or 24.1%) and 4/80 (by one or 4.3%), the value of those failures is up sharply. The value of business failures in 4/81 of roughly $1.89 million is nearly twice (99.0%) the value of failures in 3/81, and more than twice as high (136.6%) as 4/80. However, the 4/81 value of failures is still well below the recorded highs of 2/80 and 3/80. The drop in personal bankruptcies from 3/81 to 4/81 is very similar to the drop recorded from 3/80 to 4/80.

Registration of new corporations in Wyoming does not present a clear indication of economic conditions. New foreign corporations have been registering at a very constant rate during each of the last three quarters, but the number of new domestic corporations registering to do business in Wyoming during 4/81 was less than any quarter since 3/80.

Overall, the business conditions data do not indicate how the national recession is affecting Wyoming. Data for 4/81 includes the effect on businesses of the Christmas shopping season, which may have postponed some failures. Data for the first quarter of 1982 (next WQU) should give a clearer indication of the national recession's impact on Wyoming.

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[1] Assets exceeded liabilities.

Figure 6: Construction

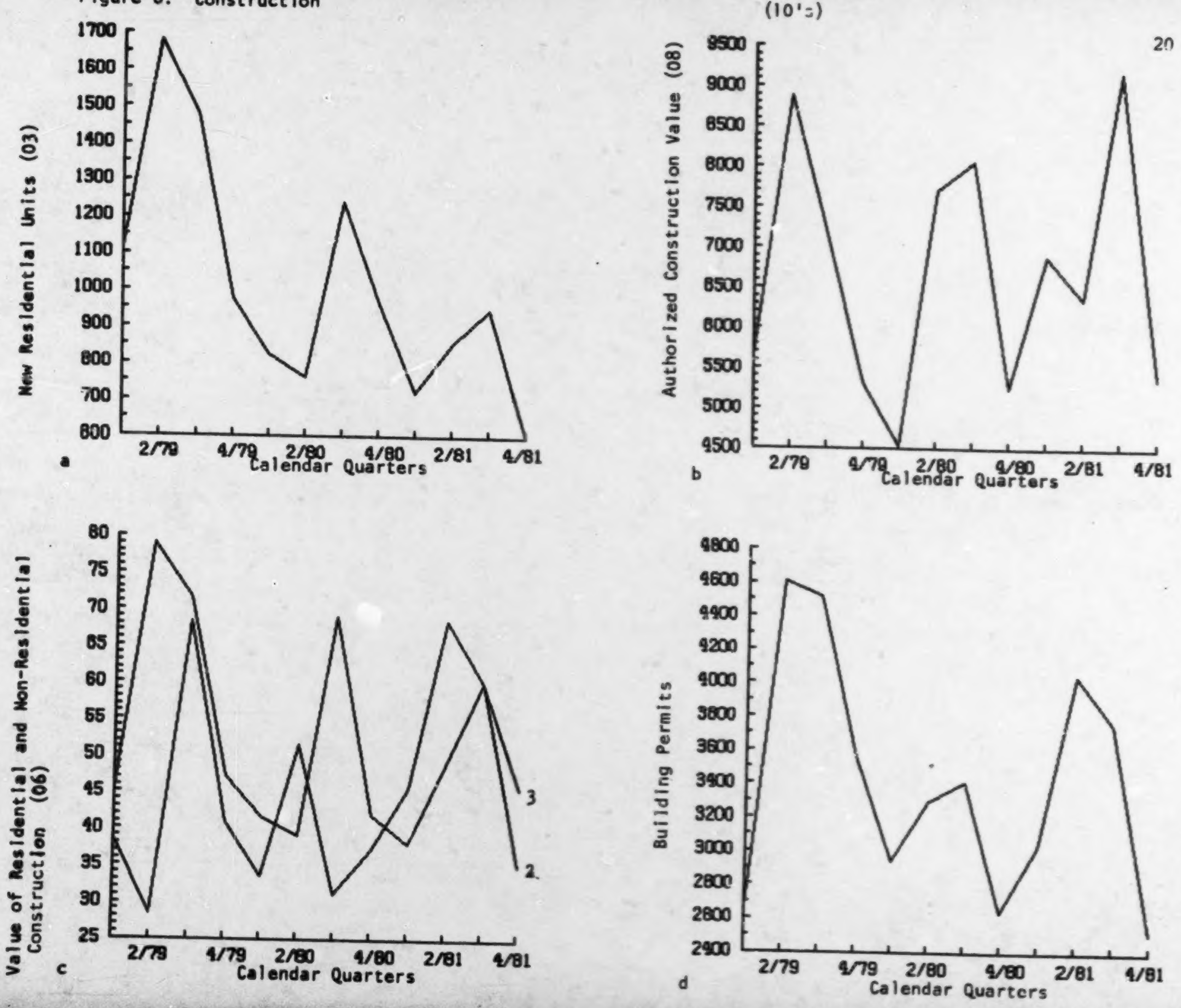

Table 6: Construction[1]

Calendar Quarters	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81
1. New Residential Dwelling Units (03)	1113.	1680.	1481.	976.	824.	762.	1240.	965.	720.	855.	948.	605.
2. Value of Residential Dwellings Constructed (06)	45.6	78.9	71.6	47.1	41.6	39.0	69.0	42.0	38.0	48.9	60.0	35.1
3. Value of Non-residential Construction (06)	38.7	28.3	68.3	40.9	33.6	51.5	31.2	37.2	45.6	68.5	60.1	45.6
4. Building Permits Issued in Selected Wyoming Cities (03)	2661.	4604.	4515.	3560.	2934.	3293.	3414.	2637.	3027.	4040.	3755.	2516.
5. Value of Authorized Construction (08)	56756.	88796.	71643.	53215.	45371.	77045.	80648.	52550.	68995.	63557.	91789.	53839.

The trend line for construction of new dwelling units is the most telling. While retaining its seasonal character (Graph A), each point in 1981 is lower than the point for the same quarter of 1980, which in turn is lower than in 1979. For instance, the 4/81 new units were 37.3 percent fewer than in 4/80, and 38.0 percent below 4/79. The long-run downward trend in the value of new residential construction (Graph C) has been moderated by inflation. While there were 37.3 percent fewer units in 4/81 than 4/80, their value was only down 16.4 percent. Wyoming's overall inflation rate, as measured by the state's Department of Administration and Fiscal Control, was only 6.1 percent from 4/80 to 4/80, so the preceding sentence would seem to imply that the inflation rate for the housing industry was much higher. Non-residential construction seems to be faring somewhat better. The 4/81 value of non-residential construction is 22.6 percent higher than in 4/80.

The indicators of future activity (new permits, value of the authorized construction) also indicate some weakness. New permits issued in 4/81 were 4.6 percent fewer in number than in 4/80, and their value was only 2.5 percent higher than a year ago; less than the overall rate of inflation.

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[1] Numbers appearing in this table may differ slightly from source data due to summing of rounded data.

Figure 7: Utilities

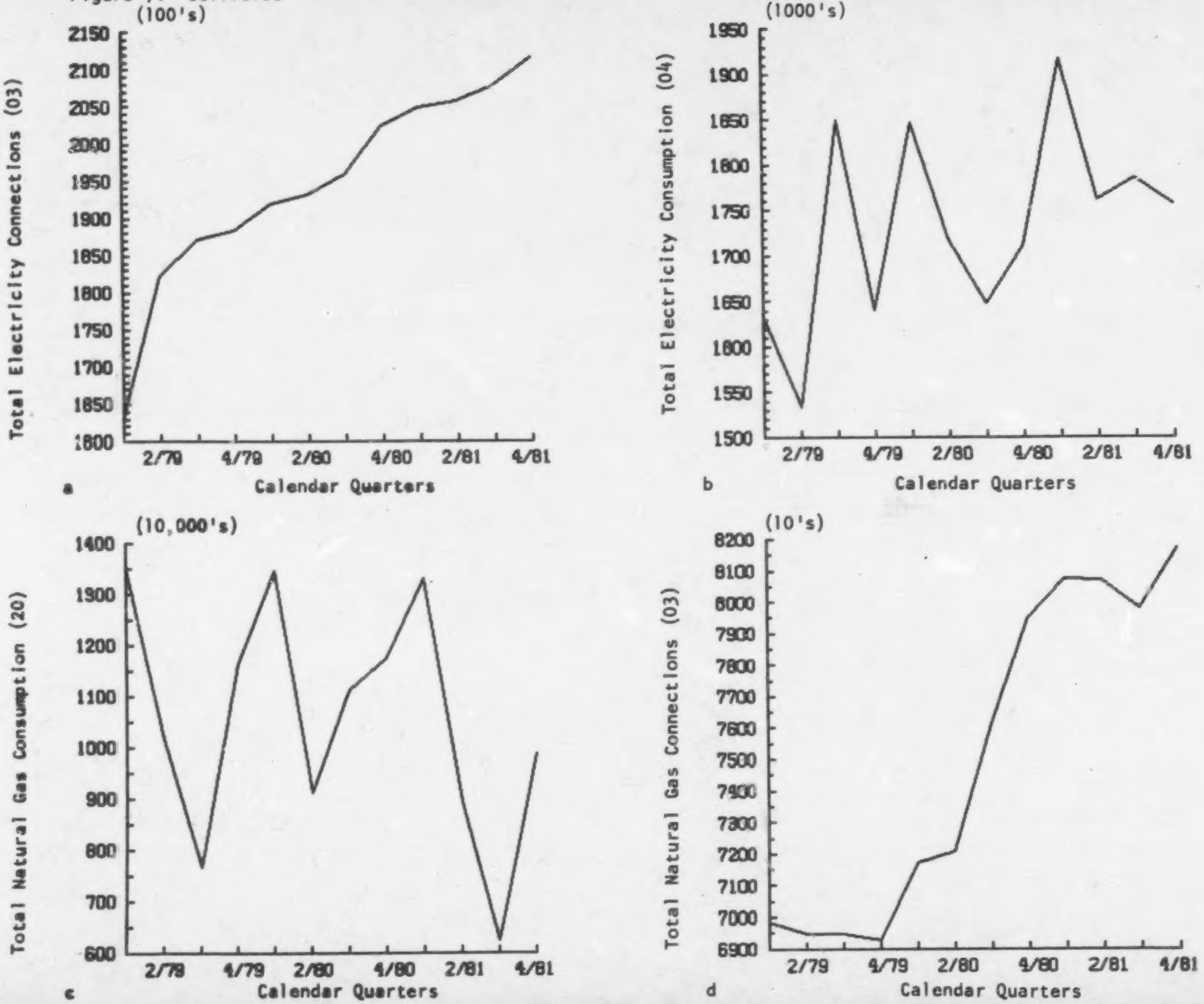

Table 7: Utilities[1]

Calendar Quarters	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81
1. Residential Electric Connections (03)	134249.	149212.	152198.	154682.	157183.	158424.	160950.	166342.	168477.	169494.	169777.	174369.
2. Residential Electric Consumption (04)	388504.	295537.	243384.	335770.	430258.	319866.	264960.	335159.	487386.	331256.	2822226.	218361.
3. Commercial Electric Connections (03)	23044.	26196.	26762.	27071.	27208.	27772.	28072.	28847.	29465.	29605.	30522.	30047.
4. Commercial Electric Consumptions (03)	272535.	260014.	273717.	265711.	282677.	267804.	287954.	271561.	298580.	288617.	317998.	303091.
5. Industrial Electric Connections (03)	2704.	3283.	3352.	2891.	2891.	2957.	3057.	3312.	3377.	3384.	3484.	3590.
6. Industrial Electric Consumption (04)	938251.	939332.	1254562.	986892.	1092324.	1096646.	1013672.	1049382.	1100964.	1097628.	1112398.	1156967.
7. Other[2] Connections (04)	3223.	3526.	4890.	3794.	4743.	3986.	3875.	3946.	3579.	3266.	4102.	3652.
8. Other Consumption (04)	34342.	38431.	78105.	51980.	40623.	34114.	80540.	55639.	30333.	45006.	72994.	79409.
9. Residential Natural Gas Connections (03)	63457.	62765.	62977.	62977.	65346.	65731.	69297.	72468.	73699.	73712.	72966.	74828.
10. Residential Gas Consumptions (20)	5070980.	2323223.	851109.	2556825.	4236345.	2311300.	787701.	2770400.	3923502.	2180779.	814900.	1247405.
11. Commercial Natural Gas Connections (03)	6147.	6396.	6161.	5997.	6095.	6026.	6360.	6561.	6595.	6557.	6385.	6393.
12. Commercial Natural Gas Consumption (20)	2623980,	1101504,	366443.	1132437.	1872572.	976489.	347976.	1125956.	1766515.	970295.	382137.	943319.
13. Industrial Natural Gas Connections (03)	119.	100.	99.	87.	87.	97.	91.	93.	92.	94.	90.	89.
14. Industrial Natural Gas Consumption (20)	5745774.	6602746.	6322784.	7734080.	6428686.	5564123.	9887644.	7647357.	7345317.	5607535.	4959825.	7479593.
15. Other Natural Gas Connections (03)	132.	216.	222.	222.	189.	216.	342.	363.	348.	344.	349.	398.
16. Other Natural Gas Consumption (20)	57156.	153280.	113356.	209720.	905798.	261674.	98459.	204268.	252249.	147575.	87695.	196349.
17. Business Telephone* Connections (03)	38649.	400003.	40852.	41718.	42307.	43374.	47023.	50115.	45794.	45495.	47932.	47828.
18. Private Telephone* Connections (03)	143081.	144301.	146054.	149103.	151834.	152882.	153475.	156290.	158741.	159456.	160688.	163100.

Despite another increase in the ever growing number of electrical connections (Graph A), electrical usage experienced (Graph B) a decline in 4/81 from 3/81 of 1.56 percent. The number of natural gas hook-ups also increased in 4/81 over 3/81 (Graph D). Natural gas usage, being highly seasonal in nature, shows the expected surge in 4/81 over 3/81 (Graph C). Still, 4/81 consumption is down over 16 percent from 4/80 consumption. Contributing to this decline are both the mild weather experienced by Wyomingites in 4/81 and the higher prices charged by utilities for their product. The total number of telephone increased 1.1 percent in 4/81 over 3/81 and increased 2.19 percent over 4/80. These increases occurred despite a 4.56 percent decline in business phones in 4/81 with respect to 4/80.

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[1] Some small utilities do not report, hence the date are slightly less than actual state totals. Data are consistent. The same utilities' reports are included in each figure

[2] Other includes Agriculture, Municipal, and Other public

*Because Mountain Bell has reported incorrect figures to IPR over a 4 year period, figures given in this edition of the WQU are significantly different than those incorrect figures reported previously.

Figure 8: Consumers

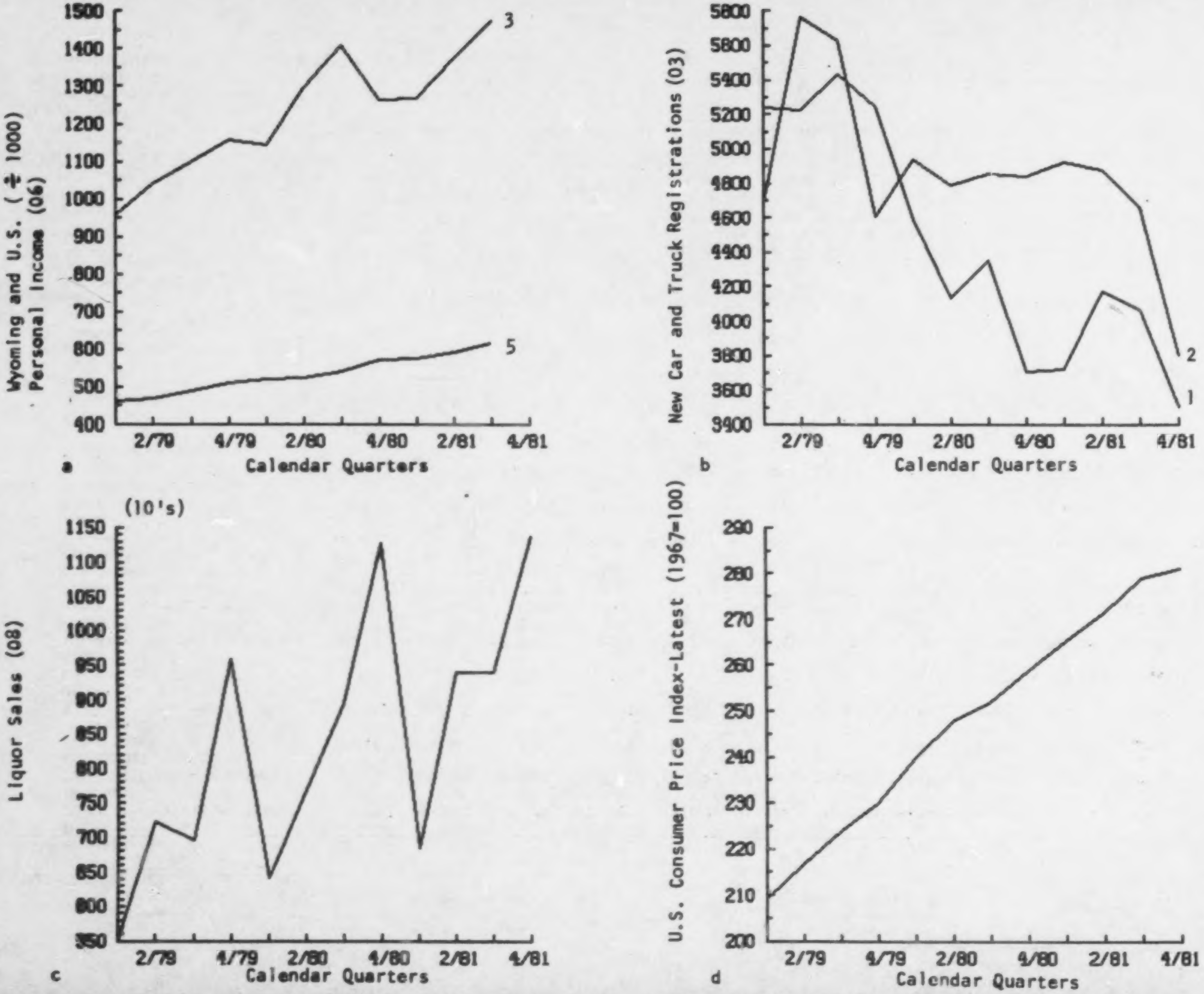

Table 8: Consumers

Calendar Quarters	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81
1. New Truck registrations (03)	5241.	5273.	5435.	5248.	4593.	4134.	4353.	3706.	3723.	4175.	4067.	3502.
2. New car registrations (03)	4681.	5765.	5628.	4608.	4937.	4787.	4859.	4839.	4926.	4879.	4664.	3808.
3. Wyoming Personal Income (06)	959.	1040.	1098.	1158.[2]	1143.	1296.	1409.	1264.	1268.	1375.	1474.	I.N.A.
4. U.S. Disposable[3] Income (07)	1572.	1602.	1640.	1683.	1765.	1784.	1841.	1897.	1948.	1986.	2042.	2104.[1]
5. U.S. Personal Income (06)	460875.	470299.	488614.	510219.[2]	521332.	524735.	542662.	572873.	574971.	594251.	615399.	I.N.A.
6. Latest U.S. Consumer[4] Price Index (1967=100)	209.3	216.9	223.7	230.0	239.9	247.8	251.9	258.7	265.2	271.4	279.1	281.1
7. Quarter's Average US CPI	207.0	214.3	221.5	227.7	236.6	245.2	249.8	256.4	263.1	269.1	276.7	280.4
8. Liquor Sales (08)	5512.	7224.	6956.	9586.	6410.	7696.	8951.	11280.	6845.	9397.	9396.	11365.

The two industries most frequently discussed by the national news media as indicative of the national recession are housing and autos. Their problems are evident in the data for Wyoming as well. The housing trends were discussed under Table 6. New car and truck registrations (Figure 8B) in 4/81 were at the lowest level of the entire reported period (1979-1981). The 4/81 registrations were 5.5 percent and 21.3 percent below 4/80 for trucks and cars respectively.

Personal income in the U.S. and Wyoming continued their steady climb with a record high in 3/81. However, the change since 3/80 (+4.6 percent) is less than Wyoming's overall inflation rate of 10.6 percent from 3/80 to 3/81. The 3/80 Wyoming personal income figure (1409) reported here differs substantially from the figure reported in the last WCU (1326) because of revisions. Business Week has been consistently reporting substantially higher revised figures a year after the original figures are published. If the revision trend continues, Wyoming personal income data reported in future editions of WCU, beginning with 4/80 in the next edition will be larger than the preliminary data reported here. More important than the personal income data trends is the change in U.S. disposable income; the amount we actually get a chance to spend. Estimated 4/81 U.S. disposable income is 10.9 percent greater than in 4/80. Since the 1981 U.S. inflation rate was 8.7 percent, the average American gained 2.2 percent in purchasing power during 1981. The most recent U.S. inflation data are even more encouraging. The U.S. rate of inflation for 4/81 projects to only a 2.9 percent annual rate. Even though nominal interest rates fell somewhat during 4/81, with a larger drop in the inflation rate, real interest rates (nominal interest rate minus inflation) reached all-time highs.

Liquor sales achieved their usual fourth quarter seasonal peak in 4/81, but inspite of inflation, 4/81 sales were only barely higher than 4/80 sales.

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[1] Preliminary. An estimate based on trend and first month of the quarter.
[2] Estimated. November 1979 data are missing.
[3] Seasonally adjusted at annual rates.
[4] Number shown is for the last month of the quarter.

Consumers

Wyoming Comparative Cost of Living Index* (January 6-8, 1982): Cheyenne = 100

City	Rank	All Items	Food	Housing	Transportation	Medical
Jackson	1	125.84	101.57	157.57	98.49	107.87
Evanston	2	113.00	105.12	124.22	101.31	105.99
Riverton	3	112.60	107.59	124.51	100.13	104.95
Casper	4	111.63	104.82	120.93	105.44	111.30
Kemmerer	5	111.57	100.95	123.94	99.30	101.88
Rock Springs	6	110.37	104.07	113.80	102.81	100.44
Sheridan	7	109.59	104.06	117.23	100.00	105.93
Gillette	8	107.60	106.37	113.37	102.56	108.19
Pinedale	9	107.48	104.07	119.34	100.53	102.62
Sundance	10	106.85	107.18	112.75	100.08	100.56
Douglas	11	106.39	108.21	107.26	101.14	114.20
Laramie	12	105.78	98.98	113.84	97.75	94.57
Thermopolis	13	105.14	108.92	105.80	98.71	99.74
Cody	14	104.45	106.37	108.38	98.00	103.04
Rawlins	15	101.28	102.22	103.84	100.99	93.71
Wheatland	16	100.65	110.14	96.10	101.55	97.92
Cheyenne	17	100.00	100.00	100.00	100.00	100.00
Buffalo	18	98.15	108.02	91.97	98.86	95.01
Newcastle	19	96.00	101.78	91.48	96.24	106.05
Worland	20	95.07	101.94	86.79	98.11	104.78
Torrington	21	93.28	97.72	86.94	96.23	101.44
Greybull	22	92.74	103.24	81.21	98.71	100.00
Lusk	23	89.49	98.89	76.08	96.79	103.41

Wyoming Comparative Cost of Living Index* (October 7-9, 1981): Cheyenne = 100

City	Rank	All Items	Food	Housing	Transportation	Medical
Jackson	1	121.29	105.14	143.99	100.95	105.16
Gillette	2	112.24	108.44	121.36	104.50	104.73
Casper	3	111.70	103.18	121.98	105.94	108.00
Sheridan	4	110.94	100.17	120.40	104.62	98.69
Kemmerer	5	109.93	104.74	118.18	102.75	99.96
Riverton	6	109.85	103.85	114.86	108.07	102.43
Evanston	7	109.04	104.33	115.76	102.50	98.12
Rock Springs	8	108.83	103.70	114.72	105.16	96.18
Pinedale	9	107.80	102.50	114.04	103.35	102.78
Douglas	10	106.51	112.00	105.01	104.95	109.96
Sundance	11	106.46	101.25	113.15	100.11	100.24
Wheatland	12	105.87	103.43	108.97	102.40	96.15
Rawlins	13	105.63	102.16	112.22	101.45	90.75
Newcastle	14	104.92	105.70	107.69	98.16	102.29
Cody	15	104.31	107.32	106.82	100.35	97.02
Laramie	16	103.82	96.87	109.68	99.00	89.47
Thermopolis	17	103.77	110.48	103.07	98.82	96.33
Buffalo	18	102.62	106.84	100.47	100.97	100.00
Cheyenne	19	100.00	100.00	100.00	100.00	100.00
Worland	20	99.75	103.85	96.90	99.62	96.72
Torrington	21	94.45	97.50	88.26	97.77	99.10
Greybull	22	93.77	104.01	82.12	100.32	97.57
Lusk	23	91.20	99.46	77.62	97.31	99.26

Source: Wyoming Department of Administrative and Fiscal Control

*Apparel and Recreation Indices not shown.

Per Capita Dividend, Interest and Rent Income
Wyoming Counties and State

County	1974	1975	1976	1977	1978	1979
Albany	$ 708.40	$ 801.26	$ 842.65	$ 986.20	$ 1095.54	$ 1,192.24
Big Horn	690.93	736.67	778.36	923.90	1,015.54	1,110.71
Campbell	815.75	1,049.31	1,042.76	1,093.27	1,093.00	1,126.30
Carbon	976.98	934.70	993.18	1,127.51	1,196.09	1,261.88
Converse	1,149.21	1061.00	1,006.91	1,082.92	1,051.38	1,059.35
Crook	996.74	1,012.04	1,107.65	1,245.09	1,336.79	1,430.53
Fremont	620.65	655.54	745.61	898.06	951.04	1,018.92
Goshen	926.75	1,033.76	1,100.82	1,347.60	1,546.55	1,824.96
Hot Springs	877.71	965.92	1,003.73	1,237.35	1,391.22	1,268.70
Johnson	1,486.85	1,465.09	1,498.67	1,734.92	1,862.50	2,058.18
Laramie	835.02	902.54	961.80	1,123.67	1,252.18	1,359.00
Lincoln	881.60	885.76	857.90	935.82	1,027.17	1,110.76
Natrona	1,125.51	1,161.75	1,233.22	1,408.66	1,488.13	1,609.86
Niobrara	1,487.14	1,583.45	1,599.31	1,732.00	2,025.52	2,234.33
Park	1,174.21	1,394.31	1,428.10	1,644.23	1,792.97	1,930.66
Platte	1,053.14	1,160.00	1,200.39	1,350.12	1,421.12	1,375.81
Sheridan	1,707.50	1,634.67	1,685.90	1,919.12	2,061.85	2,169.02
Sublette	1,783.68	1,622.93	1,730.24	1,875.45	2,161.63	2,252.13
Sweetwater	639.85	613.39	646.68	723.92	751.40	804.81
Teton	2,324.44	2,468.59	2,683.24	3,237.54	3,346.67	3,615.70
Uinta	628.74	606.95	647.92	732.77	779.63	825.83
Washakie	863.08	1,072.84	1,110.96	1,222.30	1,355.80	1,502.67
Weston	888.20	1,089.05	1,128.64	1,271.01	1,390.00	1,520.54
Wyoming	$ 964.74	$ 1017.45	$ 1070.80	$ 1226.95	$ 1317.39	$ 1414.78

Comparisons of Wyoming Counties to each other and the State
Per Capita Personal Income Wyoming Counties & State

County	1974	1975	1976	1977	1978	1979
Albany	$3,803.00	$4,455.00	$4,808.00	$ 5,790.00	$ 6,614.00	$ 7,061.00
Big Horn	4,695.00	4,860.00	4,861.00	5,272.00	5,957.00	6,684.00
Campbell	5,337.00	6,888.00	7,806.00	9,186.00	9,944.00	10,766.00
Carbon	5,538.00	6,047.00	6,883.00	7,804.00	8,808.00	10,174.00
Converse	5,353.00	5,936.00	6,549.00	7,184.00	8,177.00	9,120.00
Crook	4,585.00	4,959.00	5,649.00	6,599.00	7,486.00	8,724.00
Fremont	4,265.00	4,617.00	5,453.00	6,307.00	7,425.00	8,186.00
Goshen	5,014.00	4,940.00	5,304.00	6,045.00	6,413.00	7,779.00
Hot Springs	4,918.00	5,441.00	6,074.00	6,467.00	7,545.00	7,899.00
Johnson	5,206.00	5,481.00	5,693.00	6,359.00	7,564.00	8,397.00
Laramie	6,078.00	6,465.00	7,074.00	7,788.00	8,842.00	9,640.00
Lincoln	5,247.00	5,410.00	5,936.00	6,603.00	7,229.00	8,251.00
Natrona	7,011.00	7,839.00	8,823.00	10,080.00	11,354.00	12,842.00
Niobrara	5,092.00	5,689.00	6,949.00	7,114.00	8,817.00	8,759.00
Park	5,884.00	6,282.00	6,687.00	7,667.00	8,293.00	8,871.00
Platte	4,832.00	4,621.00	5,166.00	6,115.00	6,649.00	7,646.00
Sheridan	5,830.00	6,147.00	6,731.00	7,598.00	8,708.00	9,562.00
Sublette	7,116.00	6,002.00	6,744.00	7,596.00	9,003.00	10,046.00
Sweetwater	7,109.00	7,203.00	7,959.00	8,416.00	9,233.00	10,577.00
Teton	7,219.00	8,047.00	8,859.00	10,144.00	11,075.00	12,261.00
Uinta	4,794.00	4,794.00	5,095.00	5,773.00	6,315.00	7,706.00
Washakie	4,985.00	5,454.00	5,784.00	6,302.00	7,418.00	8,611.00
Weston	5,125.00	6,183.00	6,711.00	7,806.00	8,456.00	9,586.00
Wyoming	$5,662.00	$6,127.00	$6,777.00	$ 7,649.00	$ 8,627.00	$ 9,630.00

~~Per Capita Dividend, Interest and Rent Income~~ Transfer Payments
Wyoming Counties and State

County	1974	1975	1976	1977	1978	1979
Albany	$ 395.75	$ 506.25	$ 549.00	$ 608.59	$ 668.33	$ 731.84
Big Horn	550.46	639.91	691.03	759.24	815.62	897.38
Campbell	292.25	330.73	351.10	361.96	376.11	381.99
Carbon	449.69	509.82	557.34	591.27	627.08	652.61
Converse	466.53	512.25	484.04	518.11	510.41	512.73
Crook	445.87	482.04	547.06	604.15	632.32	700.53
Fremont	452.28	559.10	603.93	638.15	660.90	699.71
Goshen	595.35	691.97	746.07	850.08	946.97	1118.43
Hot Springs	839.79	1124.50	999.02	1104.29	1242.65	1265.00
Johnson	666.48	740.18	776.17	848.36	911.56	995.91
Laramie	666.46	798.94	887.15	981.06	1070.91	1159.66
Lincoln	475.74	555.76	597.62	631.82	653.14	728.32
Natrona	518.14	591.64	616.51	653.16	675.07	724.96
Niobrara	647.14	727.93	824.48	840.33	952.41	1057.67
Park	534.48	625.64	676.87	757.76	827.92	888.40
Platte	612.14	721.81	742.99	776.75	803.82	775.52
Sheridan	792.81	897.64	947.14	1011.75	1058.24	1101.31
Sublette	391.84	450.73	494.63	529.55	602.33	630.00
Sweetwater	382.89	444.28	492.34	517.00	534.38	568.60
Teton	467.51	582.97	617.94	726.81	732.80	775.06
Uinta	552.41	604.63	679.06	730.99	757.38	789.57
Washakie	508.85	575.31	627.83	694.83	769.55	851.00
Weston	482.30	555.87	595.76	639.86	686.76	743.38
Wyoming	$ 531.47	$ 619.15	$ 666.59	$ 718.01	$ 759.23	$ 810.58

Personal Income Generated in the Counties as a Percent of the State Total
Wyoming Counties*

County	1974	1975	1976	1977	1978	1979
Albany	5.10	5.20	5.06	5.29	5.18	4.87
Big Horn	2.47	2.35	2.13	2.01	1.97	1.94
Campbell	3.14	3.92	4.29	4.97	5.14	5.24
Carbon	4.38	4.41	4.49	4.56	4.61	4.86
Converse	1.87	2.07	2.32	2.45	2.75	2.85
Crook	1.03	1.05	1.09	1.12	1.14	1.15
Fremont	6.39	6.27	6.60	6.83	7.22	7.16
Goshen	2.80	2.52	2.45	2.36	2.09	2.07
Hot Springs	1.15	1.15	1.17	1.03	1.00	.99
Johnson	1.37	1.35	1.30	1.25	1.31	1.27
Laramie	18.59	17.72	17.06	16.13	15.63	15.06
Lincoln	2.40	2.33	2.35	2.33	2.23	2.27
Natrona	18.01	18.67	19.03	19.41	19.67	19.70
Niobrara	.69	.71	.75	.68	.71	.61
Park	5.27	5.14	4.93	4.83	4.57	4.36
Platte	1.65	1.45	1.50	1.63	1.62	1.86
Sheridan	5.46	5.32	5.34	5.30	5.40	5.40
Sublette	1.31	1.06	1.05	1.07	1.07	1.10
Sweetwater	9.23	9.50	9.50	9.14	9.18	9.44
Teton	2.23	2.24	2.26	2.26	2.27	2.25
Uinta	2.03	1.98	1.85	1.88	1.84	2.04
Washakie	1.90	1.91	1.82	1.76	1.77	1.80
Weston	1.51	1.68	1.66	1.73	1.64	1.65

*Totals may not sum to 100 due to rounding error

Population of Counties as a Percent of the State
Wyoming Counties

County	1974	1975	1976	1977	1978	1979
Albany	7.6	7.2	7.1	7.0	6.7	6.6
Big Horn	3.0	3.0	3.0	2.9	2.8	2.8
Campbell	3.3	3.5	3.7	4.1	4.5	4.7
Carbon	4.5	4.5	4.4	4.5	4.5	4.6
Converse	2.0	2.1	2.4	2.6	2.9	3.1
Crook	1.3	1.3	1.3	1.3	1.3	1.3
Fremont	8.5	8.3	8.2	8.3	8.4	8.4
Goshen	3.2	3.1	3.1	3.0	2.8	2.6
Hot Springs	1.3	1.3	1.3	1.2	1.2	1.2
Johnson	1.5	1.5	1.5	1.5	1.5	1.5
Laramie	17.3	16.8	16.3	15.8	15.2	15.1
Lincoln	2.6	2.6	2.7	2.7	2.7	2.6
Natrona	14.5	14.6	14.6	14.7	14.9	14.8
Niobrara	.8	.8	.7	.7	.7	.7
Park	5.1	5.0	5.0	4.8	4.8	4.7
Platte	1.9	1.9	2.0	2.0	2.1	2.3
Sheridan	5.3	5.3	5.4	5.3	5.3	5.4
Sublette	1.1	1.1	1.0	1.1	1.0	1.0
Sweetwater	7.4	8.1	8.1	8.3	8.6	8.6
Teton	1.7	1.7	1.7	1.7	1.8	1.8
Uinta	2.4	2.5	2.5	2.5	2.5	2.6
Washakie	2.2	2.2	2.1	2.1	2.1	2.0
Weston	1.7	1.7	1.7	1.7	1.7	1.6

Total Employment
Wyoming Counties and State

County	1974	1975	1976	1977	1978	1979
Albany	10,483	10,472	11,105	12,276	12,895	13,140
Big Horn	4,766	4,776	4,886	5,082	5,162	5,303
Campbell	6,156	7,661	9,101	11,743	12,565	14,065
Carbon	8,446	8,546	9,054	10,379	10,940	11,924
Converse	3,355	3,967	4,579	5,425	5,677	6,394
Crook	2,105	2,210	2,322	2,405	2,477	2,515
Fremont	12,358	12,744	13,840	15,311	17,021	17,648
Goshen	5,058	5,177	5,333	5,322	5,484	5,695
Hot Springs	2,218	2,306	2,239	2,263	2,297	2,469
Johnson	2,525	2,753	2,674	2,600	2,964	3,149
Laramie	32,934	32,855	34,008	35,176	36,957	38,122
Lincoln	4,657	4,592	4,828	5,280	5,245	5,560
Natrona	27,106	29,510	31,310	34,870	38,990	41,497
Niobrara	1,349	1,416	1,398	1,350	1,443	1,315
Park	9,470	10,034	10,491	10,943	11,693	11,890
Platte	3,262	3,383	3,542	3,755	4,542	5,290
Sheridan	8,750	9,092	9,614	10,053	10,856	11,360
Sublette	2,069	2,175	2,139	2,228	2,191	2,248
Sweetwater	17,153	17,239	18,095	18,608	20,354	21,736
Teton	4,413	4,746	5,196	5,674	6,437	7,012
Uinta	3,743	3,893	3,909	4,244	4,641	5,309
Washakie	3,586	3,750	4,111	4,248	4,542	4,899
Weston	2,915	2,930	2,968	3,203	3,382	3,498
Wyoming	178,877	186,227	196,742	212,438	228,755	242,038

Table 9: Government

Calendar Quarters	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81
Criminal Justice Statistics												
1. Violent Crime[1] (24)	291.	367.	419.	410.	363.	421.	496.	439.	420.	468.	599.	553.
2. Non-Violent Crime[2] (24)	4276.	5003.	5172.	4803.	4331.	5464.	5710.	4916.	5430.	5783.	6111.	5299.
3. Stolen Property (08)	2789.	2666.	3207.	2421.	3837.	3374.	3945.	3696.	3601.	4471.	4421.	3201.
4. Stolen Property Recovery Rate (02)	53.1	53.5	45.6	48.6	43.4	51.9	41.9	46.8	36.0	45.4	40.6	58.6
5. Percent of Crimes[3] Cleared (02)	26.5	23.4	22.3	23.0	23.0	19.1	19.0	23.4	21.6	23.4	19.5	22.3
6. Sales and Use Tax Collections (08)	40605.	40689.	40569.	41993.	46409.	56658.	59173.	58322.	59218.	60174.	65841.	69428.

Sales and use tax collections increased in 4/81 for the fifth consecutive quarter, and for the ninth time in the last ten quarters. 4/81 collections were up 19.04 percent over 4/80 collections. This compares favorably with the 6.1 percent inflation rate experienced by Wyoming over the same period, and thus indicates that some real growth in sales subject to tax occurred in Wyoming during that period.

Crime statistics continue to be depressing. Despite a slight decline in crime from 3/81 to 4/81 (violent crime down 7.7 percent, nonviolent crime down 13.3 percent), the figures show a large increase in 4/81 over the same quarter in 1980 (violent crime up 26.0 percent, non-violent crime up 7.8 percent). On the brighter side of this situation, the value of the property stolen in 4/81 was less than the value of the booty taken in 4/80, and more of this plunder was restored to its' rightful owners in 4/81 than in 4/80.

For the year, 1981 (averages of quarterly figures), violent crime is up 18.67 percent and non-violent crime is up 10.78 percent. In addition, the value of all property stolen in 1981 increased 5.67 percent and the recovery rate dropped .85 percentage points. For all crime the average quarterly clearance rate declined from 21.7 percent in 1980 to 21.125 percent in 1981.

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[1] Murder, negligent homicide, forcible rape, robbery, aggravated assault

[2] Burglary, larceny, auto theft

[3] Clearance of a crime indicates resolution of a complaint by arrest of other extra-ordinary means.

Table 10: Banking and Finance

Calendar Quarters	1/79	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81
1. Total Bank Loans (08)	1531115.	1618031.	1667332.	1661606.	1677881.	1689496.	1722916.	1764381.	1808747.	1898325.	1979706.	1984965.
2. Total Bank Deposits (08)	2336169.	2439970.	2510176.	2734107.	2651863.	2755238.	28264[illegible]7.	3034647.	2968348.	3112270.	3161593.	3278504.
3. Total Bank Demand Deposits (08)	674252.	706104.	748983.	865452.	746467.	796838.	839111.	878444.	736161.	737837.	759658.	731429.
4. Banks' Loan - Deposit Ratio	.66	.66	.66	.61	.63	.61	.61	.58	.61	.61	.61	.61
5. Savings and Loan[1] Mortgage loans (08)	623282.	642[illegible]25.	687735.	706103.	711387.	719627.	741479.	770474.	776172.	788526.	785208.	778334.
6. Savings and Loan Deposits[1] (08)	638431.	666293.	689301.	724538.	749815.	770186.	788448.	842740.	874533.	891585.	911587.	904212.

Despite high interest rates, banks in Wyoming experienced growth in total loans of 12.5 percent from 4/80 to 4/81. This increase in debt held by Wyoming banks was accompanied by an increase of 8.04 percent in total bank deposits in 4/81 with respect to 4/80. This increase occurred despite a 16.74 percent decline in demand-type deposits. Two factors which may contribute to this trend are: (1) the tax benefits provided by long term IRA and Keogh accounts (2) all-time high real interest rates (one measure is prime interest rate minus inflation rate = real interest rate, about 14 percent in 4/81).

While 4/81 represents the third consecutive quarter of declining Savings and Loan (S & L) mortgage loans, the amount loaned in 4/81 is still 1 percent more than the amount lent in 4/80. The fact that housing costs inflated at a 12.9 percent annual rate nationwide during the first 9 months of 1981 indicates that loan volume in terms of individual mortgages has declined. Because of high interest rates, S & Ls are accumulating unused funds. During 4/81 only 86.08 percent of S & L funds were being used for mortgages. This compares to the 91.42 percent being utilized in 4/80 and the 97.46 percent in use in 4/79.

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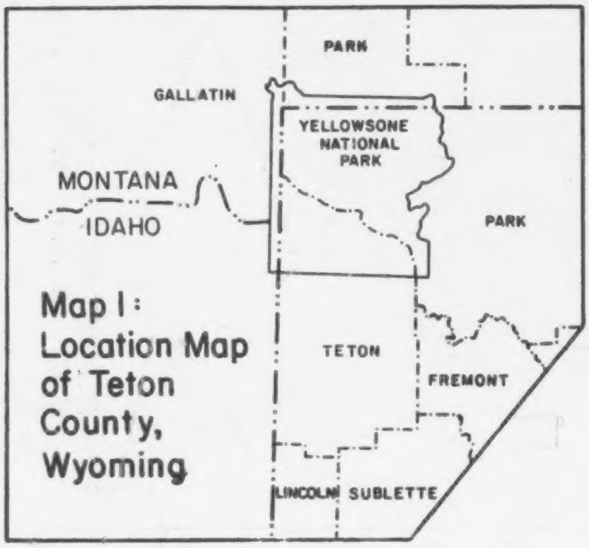
[1] Only data from members of the Federal Home Loan Bank Board are included.

Teton County Profile

by R. Bruce Waldo
and John Merrifield

PHYSICAL CHARACTERISTICS

Located in northwestern Wyoming, Teton County covers an area of 2,873 square miles, (Figure 1), with the exception of Jackson Hole valley, which is about 50 miles long and 8 to 12 miles wide. Teton County is comprised of high, rugged, mountainous terrain. The Teton Range is the major geophysical characteristic of Teton County. With the exception of Teton Pass at the southern end, it presents an almost vertical wall some 40 miles long, with peak elevations ranging from 9,000 to over 13,000 feet. The highest peak is Grand Teton, with an elevation of 13,766 feet. Other major peaks include Mount Owen, Middle Teton, Mount Moran, South Teton and Teewinot Mountain, all attaining over 12,000 feet in elevation.


Map I: Location Map of Teton County, Wyoming

About half (4504) of Teton County's 1980 resident population of 9354 live in Jackson. They enjoy a cool, dry climate. The mean daily high temperature in Jackson ranges from a low of 26.2° in January to a high of 81.4° in July, while the mean daily lows range from 6° in January to 39.9° in July. On the average, Jacksonites may expect 54 days each year with precipitation of .1 inch or more. In total, an average of 15.29 inches of moisture fall in Jackson each year.

HISTORY

The history of Teton County can be seen in its place-names. The name of the county was inspired by French trappers in the early 1800s who saw a resemblance in the west side of the Teton Range to a woman's breasts and called it "Les Trois Tetons." Had the name been in English, changes would undoubtably have occurred.

The great mountainman William Sublette named the large valley east of "Les Trois Tetons" after a friend, David Jackson. Thus today we have the town of Jackson, located in the valley called Jackson Hole, near Jackson Lake. Another trapper, Richard Leigh, named a lake after his wife Jenny and another after himself.

Mount Moran and Moran Junction are both named after the famous landscape artist Thomas Moran. He first visited the area with the U.S. Geological Survey in 1879. His paintings contributed to the recognition of the area's natural beauty.

The first permanent residents arrived in the valley in 1883, the first cattle in 1884, and the first post office was established in 1891. The post office was named Marysville in honor of its post mistress. The Simpson homestead provided the site of the first grocery store and, in 1901, the first surveyed lots of the town of Jackson.

Figure 9: Teton County's On-line Data Base

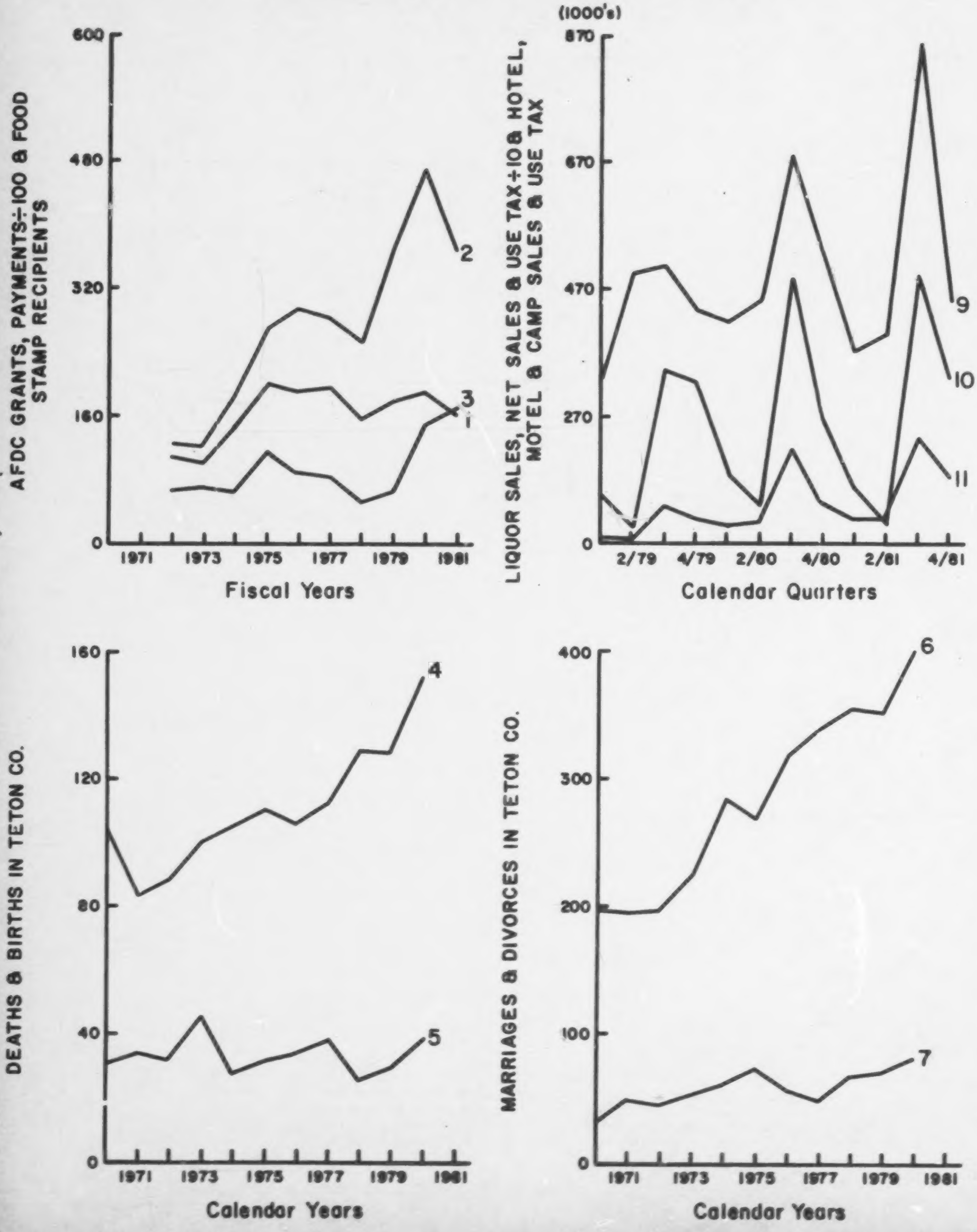


Table 11: Teton County Profile

Fiscal Years	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
1. AFDC Recipients (03)	INA	INA	108	100	144	198	190	195	157	181	188	162
2. AFDC Payments (05)	INA	INA	12458	12203	18450	26892	29713	28474	25651	37320	47009	36393
3. Food Stamp Recipients (03)	INA	INA	65	69	62	114	93	85	54	66	149	167
Calendar Years	**1970**	**1971**	**1972**	**1973**	**1974**	**1975**	**1976**	**1977**	**1978**	**1979**	**1980**	**1981**
4. Births (03)	104	83	88	100	105	110	106	112	129	129	152	INA
5. Deaths (03)	31	34	32	45	28	32	34	38	26	29	38	INA
6. Marriages (03)	196	193	195	225	283	268	318	339	356	351	399	INA
7. Divorces (03)	28	48	42	52	61	72	57	48	65	67	81	INA
8. Population** (03)	4823	5100	5400	5792	6300	6416	6800	6981	7600	7931	9354	10102*
Calendar Quarters	**1/79**	**2/79**	**3/79**	**4/79**	**1/80**	**2/80**	**3/80**	**4/80**	**1/81**	**2/81**	**3/81**	**4/81**
9. Liquor Sales (05)	339634	493252	500757	429835	414105	437346	689644	521186	380218	412168	859539	463960
10. Hotel, Motel & Camp Sales & Use Tax (05)	157777	110608	354546	326223	176563	141786	491583	271013	160455	104055	495272	341000≠
11. Net Collections, Sales & Use Tax (05)	771084	763549	1304823	1109490	1028397	1122295	2246794	1416687	1170054	1123652	2432846	1767000≠
Fiscal Years	**1970**	**1971**	**1972**	**1973**	**1974**	**1975**	**1976**	**1977**	**1978**	**1979**	**1980**	**1981**
12. State Board of Equalization Valuations (05)	1458225	1776961	2108081	2065539	2250526	3064263	3467819	3685332	4221156	4813289	5344029	6428787
13. Locally Assessed Property Valuations (05)	15364239	16918251	18409568	20479095	22396801	22795218	25594776	31664467	33081478	35086191	42515673	45402212
14. Cigarette Tax Dist. (05)	49061	50517	56083	62857	60369	63490	66698	76295	73245	79055	80844	84661

*Estimate based on 8% annual growth scenario (Stuart and Nichols Capital Facility Needs Study, 1980).

**1971 through 1979 are Census Bureau estimates, not actual counts as in 1970 and 1980.

≠ IPR Estimates based on October & November Data with December estimated from historical trends.

Other important dates are: 1872--Yellowstone area established as a National Park, 1914--the incorporation of Jackson as a town, 1921--creation of Teton County, 1927--establishment of the Elk Refuge, 1929--Establishment of Grand Teton National Park (GTNP), 1943--Establishment of Jackson Hole National Monument (JHNM), 1950--expansion of GTNP and elimination of JHNM.

NATURAL RESOURCES

Minerals

Deposits of copper in Teton County occur in minable quantities, and a small amount of placer gold can be found in the gravel of the Hoback River. Dinosaur bones containing uranium were found near Kelly Slide. At present, no commercial metal mining is underway in Teton County.

Nonmetals are more abundant, including minable deposits of bentonite, dolomite, phosphate, limestone, talc, volcanic ash, and coal. Only the limestone deposits have had any commercial development. Until recently, Teton County was considered dry with respect to oil or natural gas. Recent discoveries of oil and gas in the "Overthrust Belt" of western Wyoming have spurred exploration in Teton County. While results are inconclusive to date, drilling continues.

Water

Teton County, unlike most of Wyoming, has relatively abundant water. Although 15th in land area among Wyoming's 23 counties, Teton County ranks 2nd in total surface water. The Snake River and its nine principal tributaries move about 5,000,000 acre-feet of water per year, and the Jackson Lake Reservoir has a 847,000 acre-feet capacity. Because of the abundance of surface water, water supply does not constitute a problem. If, however, water is needed at a point distant from a stream, groundwater should be available almost anywhere in Jackson Hole. In addition, the north flank of the Gros Ventre range is an artesian structure, and could be developed to provide a large quantity of groundwater.

Forests

Parts of four different national forests (Teton, Shoshone, Bridger and Targhee) lie within Teton County. In total, over 1.1 million acres of forest land exist in Teton County, less than half of which is considered commercially operable. Studies indicate that a sustained yield of 16,000 million board-feet can be attained annually.

THE PROFILE

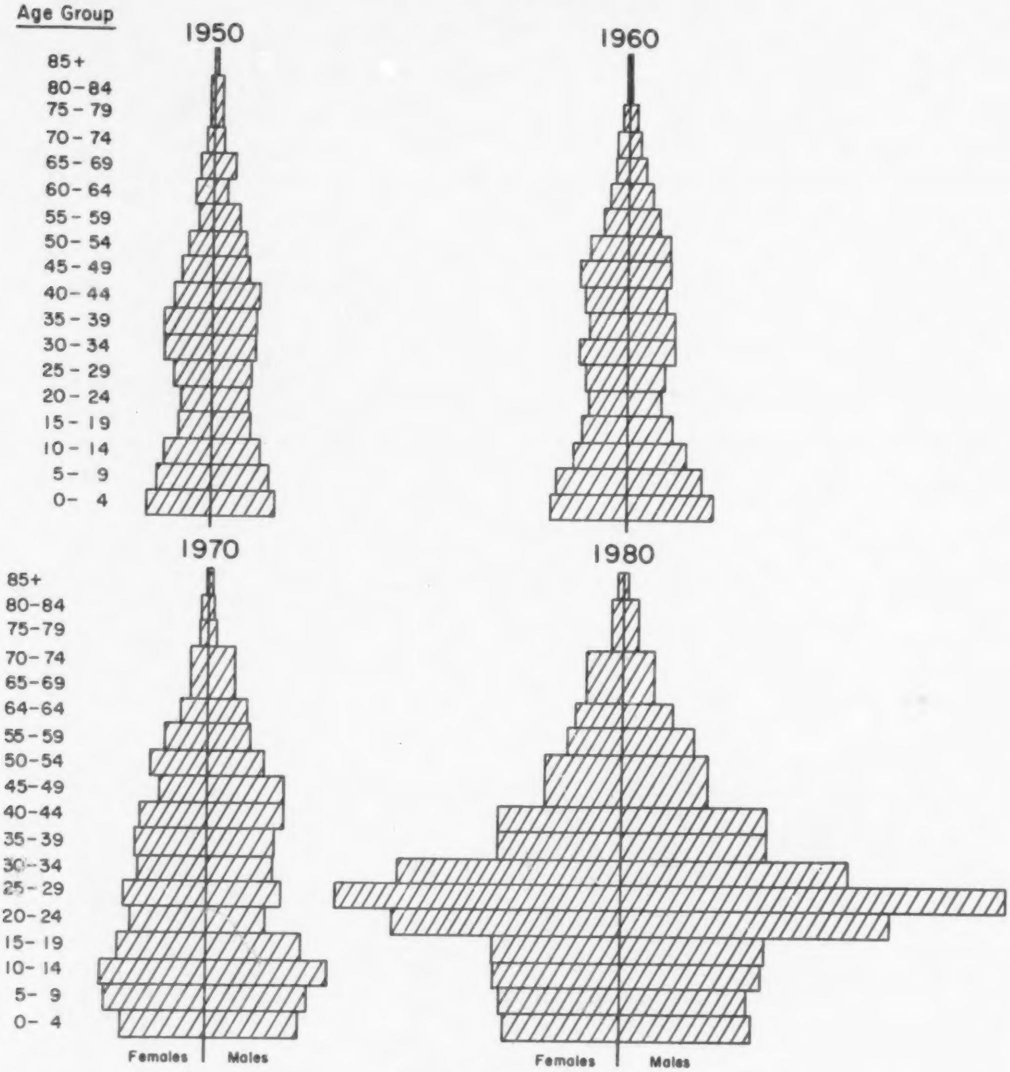
The population of Teton County has grown substantially in the past 10 years. The 1970 census recorded 4823 residents, while figures from the 1980 census show 9354 residents in Teton County, an increase of 93.9 percent. This is well above the 41.1 percent growth experienced by the state as a whole. This growth has been due primarily to the development and expansion of the recreation and tourist industries.

While all age groups show a population increase during the '70s, the 20 to 34 age group shows the largest increases. This age bracket contained 40 percent of the population of Teton County in 1980, while, in 1970 only 21 percent of the population fell in this age group. Statewide, the 20 to 34 group comprises 31 percent of the population in 1980.

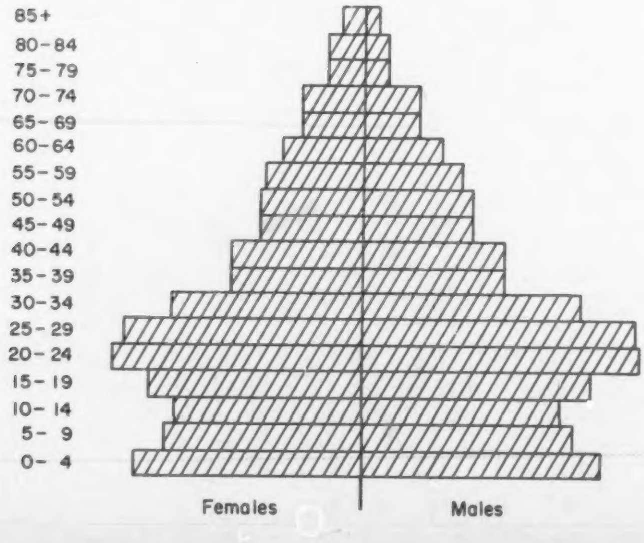
The marital status of Wyomingites over the age of 15 show that 23 percent are single, 63.9 percent married, 1 percent separated, 5.2 percent widowed and 6.9 percent divorced. Teton County adults show considerably more singles, with 33.9 percent single, 53.6 percent married, 1.2 percent separated, 2.9 percent widowed and 8.4 percent divorced.

Per capita personal income in Teton County reached $12,281 in 1979. This compares favorably with the state as a whole, where per capita personal income reached $9,620 in 1979.

Figure 10: Teton County; Age by Sex in 5-year Age Groups, 1950, 1960, 1970, 1980



Wyoming: Age by Sex 5yr. age groups: 1980



The population of Teton County can be summarized as: growing rapidly, particularly in the 20-34 age group, almost evenly divided between men and women, almost exclusively white, somewhat more apt to be single than elsewhere in Wyoming, and with a 27.7 percent higher 1979 per capita income than the Wyoming average.

Along with the rapid growth in population of 6.85 percent per year from 1970 to 1980, marriages, births, and divorces kept pace (see Figure 9), increasing 7.37 percent, 3.87 percent, and 11.2 percent per year respectively. Interestingly, deaths showed little long term upward trend but seem to vary around a mean of 36.7 deaths per year.

The number of social welfare recipients could be expected to increase with the population. It is interesting to note then that no real upward trend in the number of Aid to Families with Dependent Children recipients or Food Stamp recipients is apparent since 1972. While in the past two years the number of Food Stamp recipients has increased, no long-term trend is apparent.

ECONOMY

When the first permanent settlers arrived in Teton County in 1883, cattle ranching was established as the major economic activity in the county. Ranching continued as the predominate activity until 1929, when tourists began to arrive in large numbers to visit the newly created Grand Teton National Park. By 1978, over 70 percent of the county's labor income (labor income does not include transfer payments, dividends, interest, or rent) could be traced directly to tourism. The remaining 30 percent is generated primarily by agriculture, government spending, and construction.

In 1978, agriculture, once the mainstay of the economy, produced only 2.19 percent of the income generated in Teton County. Despite the reduction in economic importance of agriculture to the county, Jackson Hole is still ranching country. At the end of 1978, over 85 percent of the privately held land in Teton County was devoted to agriculture. Twenty-eight Teton County ranches ran 100 or more head of cows and calves.

Most of the ranches run commercial beef cattle, although some purebred operations exist. The ranches are traditional cow-calf or cow-calf-yearling operations. Cattle are kept on grazing leases (Grand Teton National Park or National Forest) during the summer, and kept on the ranches during the winter.

That tourism is important to the economy of Teton County is unquestionable. Two indicators (liquor sales, and sales and use tax on hotels, motels and camps) both show strong seasonal trends. The third calendar quarter of each year is the strongest for these indicators.

About twenty dude ranches provide a western atmosphere for some visitors, but most stay at hotels, motels, and campgrounds. Visitors, no matter where they lodge, have a wide variety of summer activities available to them, including hiking, backpacking, rock climbing, bicycling, river floating, hunting, fishing and horseback riding.

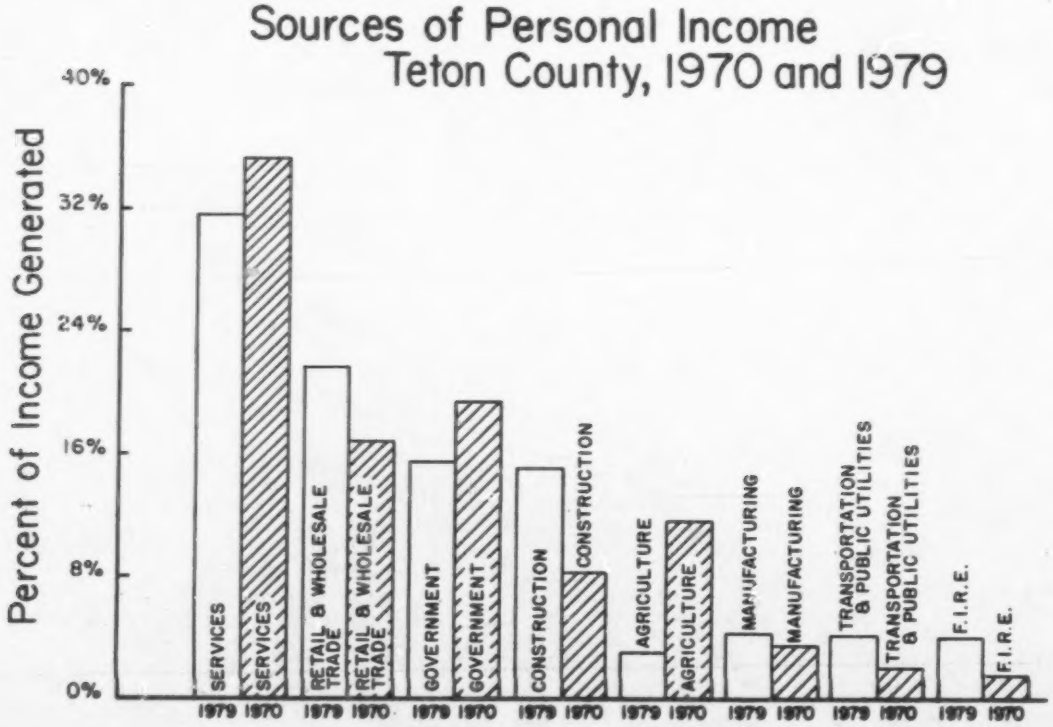
The Jackson area is not a one season tourist-recreational area. In the fall, some of the best hunting found anywhere in the United States is available in Teton County. Game species include elk, mule deer, black bear, small game, and birds. In 1979 over 11 percent of the sales attributable to recreation resulted from hunting activities.

In the winter, Jackson Hole is a world wide attraction as one of the world's most desirable skiing locations. Skier demand in terms of skier days has increased steadily over the past decade, showing an average annual rate of increase of over 12 percent.

Table 12: Personal Income by Major Source*

Source	Wyoming 1979 $	Wyoming 1979 % of Total	Teton County 1979 $	Teton County 1979 % of Total	('000's) Teton County 1979## $	('000's) Teton County 1979## % of Total
Farm	122304	3.48	2042	2.95	2279	11.83
Ag Serv., For., Fish and Other	11765	.34	136	.20	INA	
Mining	846445	24.12	140	.20	D≠	—
Construction	434772	12.39	10493	15.18	1591	8.26
Manufacturing	177123	5.05	3051	4.41	735	3.82
Transportation & Public Utilities	348261	9.92	3016	4.36	417	2.17
Wholesale Trade	152027	4.33	1573	2.28		
Retail Trade	344783	9.82	13435	19.43	3254δ	16.90
Finance, Insurance & Real Estate	120475	3.43	2907	4.20	358	1.86
Services	391429	11.15	21736	31.44	6775	35.19
Government	560224	15.96	10609	15.34	3702	19.23
Total	3509608		69138		19250	

* REIS Data
≠ Not shown to avoid disclosure
δ Sum of wholesale and retail trade
'Other' not shown but included in total



The importance of tourism and recreation to the economy of Teton County is underscored by the fact that over 50 percent of all income in the county is generated from service or sales related occupations. This compares to just over 25 percent in those occupations for the state as a whole.

A third major contributer to the economy is the construction industry. With the burgeoning population (more than a 93 percent increase from 1970 to 1980) the demand for housing has also grown. From 1970 to 1978, the number of single family dwellings increased 83 percent, and the number of multifamily units increased 277 percent. The construction industry in 1978 produced almost 16.5 percent of the income generated in Teton County. This is double the 8.22 percent it contributed in 1970, for a growth of over 9 percent a year in that industry.

The federal government's contribution to the economy of Teton County has changed very little as a percent of income generated in the county over the past decade. But, as everywhere, the government makes up a significant portion of income generated. In 1978, 15.95 percent of the income generated in Teton County derived from government operations, slightly less than the statewide figure of 17.33 percent.

A study by IPR of the economic impact of Grand Teton National Park on Teton County is nearing completion. Data indicate that at least 58.9 percent of Teton County's 1978 labor income is directly and indirectly due to purchases by park visitors, the park service's local procurements, and the park's payroll. The indirect impact is calculated by way of an economic base income multiplier of 1.50. Partial data for 1980 and 1981 indicate that changes in tourists' spending habits may be increasing the percentage (58.9) of Teton County's labor income.

The study also found that visitation would be substantially less if the 310,418 acres now managed as GTNP had remained in its original ownership: predominantly national forest and approximately 45,000 acres of private land. From comparisions of Teton County to other scenic counties which border Yellowstone (in particular Park County, Montana), it appears that at least 70 percent of Teton County's current visitor-days use are due to the existence of GTNP. In other words, the proximity of Yellowstone and the scenic beauty alone--much of which would still exist even in national forest and private ownership--would generate only 30 percent of current visitor use. The complete report will be available from GTNP in May or June.

OUTLOOK

Although the state of Wyoming is experiencing rapid, predominantly energy-related growth, and is expected to increase its population by 42 percent in the 1980s, Teton County population growth is anticipated to be much greater. A population increase of 117 percent is anticipated by 1990. To match this population increase, the economic base must also increase.

At present, Teton County relies upon the tourist and recreation industries for most of its business. Because of the scenic beauty of the area, and because of the increasing number of recreational activites available to the visitor, tourism will likely continue as the major source of income for residents. Tourism is intimately bound to other economic sectors as well. As the tourist sector grows or declines, it causes increases or decreases in the demand for service workers. This stimulates or depresses the demand for land and housing by these workers, and the level of public and private services required for them. Even a short term decline in tourism could lead to reduced population.

Curiously, the greatest threat to the future strength of Teton County's recreation and tourism industry may be the increasing interests of tourists in the area. The increasing demand for places to stay, things to do and places to visit are eroding the reasons that people are drawn here to begin with. Pressure to exploit public and private land, is coming into direct confict with recreational use.

Tourism and recreation are not the only sectors of the economy with land problems. Agriculture, specifically ranching, in Teton County is under the gun. Ranchers, who are traditionally asset-rich and cash-poor, will come under increasing pressure to sell land for subdivisions. The more land that is sold for this purpose, the greater the pressure on the remaining ranchers to sell their land.

Ranchers face another problem over the next few decades. When Grand Teton National Park was expanded, the Park Service allowed grazing permits to be renewed for the life of the permit holder and his heirs, so long as that heir was alive as of 1950. Legally, then, all grazing permits will be terminated over the next few decades. In some cases, they will be terminated quite soon.

In an area where the scenic beauty of the landscape is the major asset, energy development may seem threathening to some persons. The discovery of large reserves of oil in the Overthrust Belt just south of Teton County has led to increased exploration. At least two natural gas discoveries have been made. These are not producing wells at this time, but await the analysis of commercial feasibility.

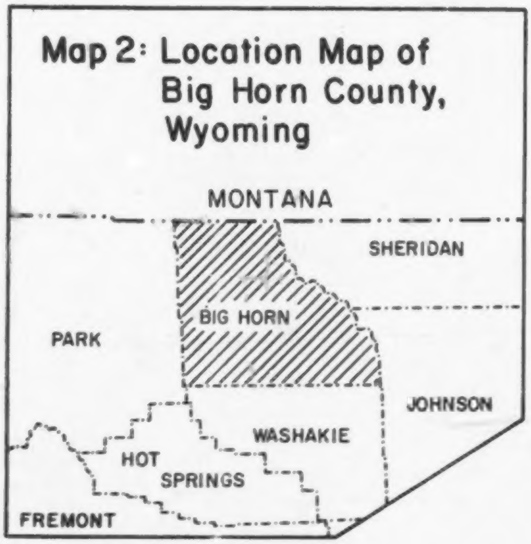
Big Horn County Profile

by R. Bruce Waldo

PHYSICAL FEATURES AND CLIMATE

Big Horn County is located in north-central Wyoming (Figure 1). It is bounded by the state of Montana to the north, Park County to the west, Washakie County to the south and by Sheridan and Johnson counties to the east.

Four counties, Park, Hot Springs, Washakie and Big Horn, make up the Big Horn Basin. This basin is almost entirely surrounded by high rugged mountains. Big Horn County makes up the northeast quarter of the basin. Elevation varies from 13,175 feet at Cloud Peak to 3,820 feet just northeast of Basin, the county seat. All of the higher elevations are found in the Big Horn Mountains, which run along the common county borders with Sheridan and Johnson counties.


Map 2: Location Map of Big Horn County, Wyoming

The three major towns in Big Horn County are all located at the lower elevations; Basin--3,875 ft., Greybull--3,890 ft. and Lovell--3,915 ft. Over 50 percent of the people in Big Horn County live in these three towns.

Big Horn County has a cool, dry climate. Temperatures are lowest in January, with a mean daily low of 5.2 degrees and a mean daily high of 30.2. The mercury reaches its zenith in July, with a mean daily high of 71.7 degrees and a mean daily low of 54.5. Subfreezing temperatures are common nine months out of the year. Precipitation, in the form of rain, sleet, hail or snow is somewhat rare in the lower elevations of Big Horn County. On average, 6.51 inches of precipitation can be expected each year.

Figure II: Big Horn County On-line Data Base

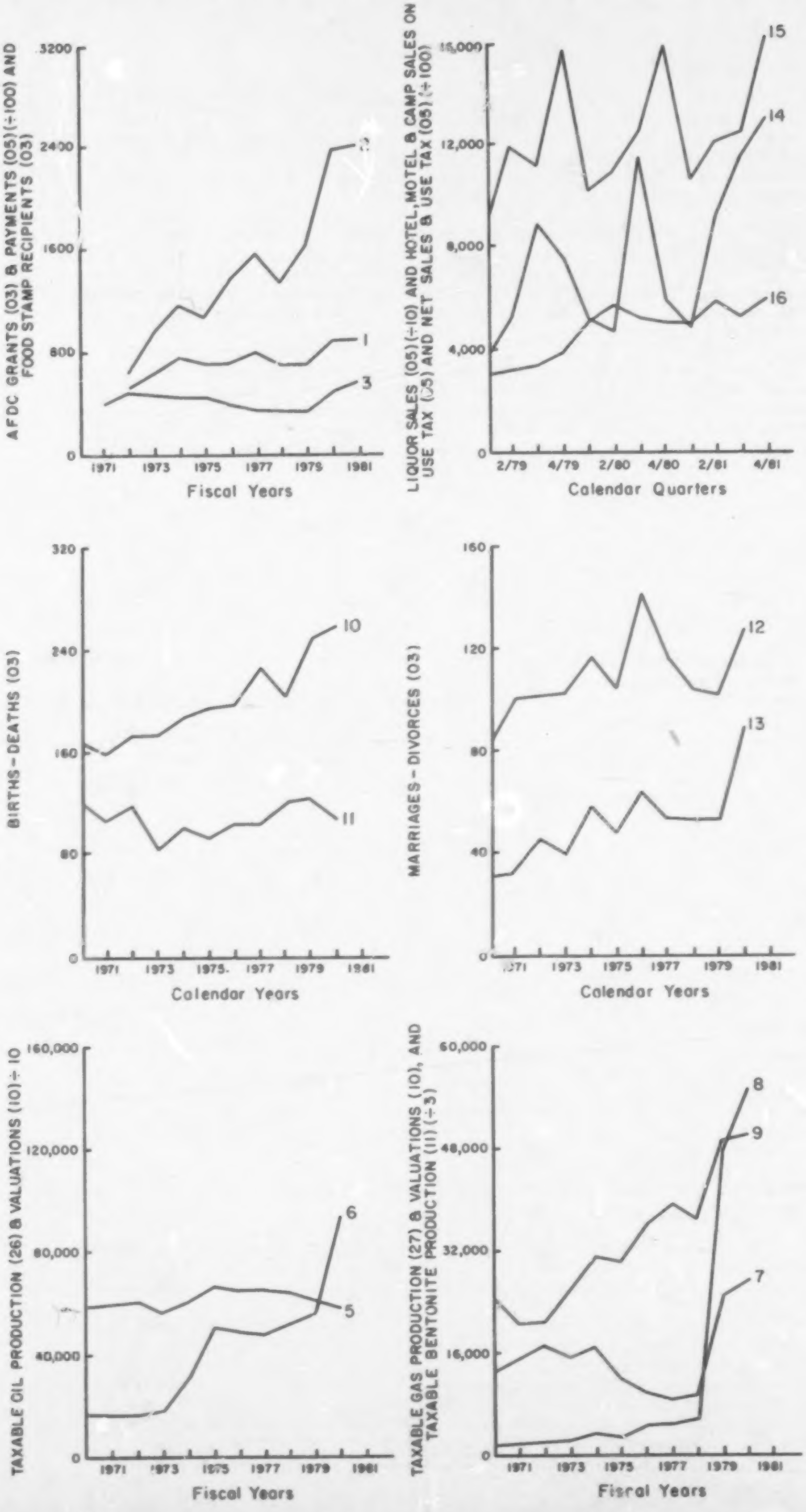


Table 13: Big Horn County Profile

Fiscal Years	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
1. AFDC Grant (03)	INA	INA	515	627	757	702	703	799	695	707	894	907
2. AFDC Payments (05)	INA	INA	63970	92479	115628	108084	136905	158716	135249	162397	238428	241603
3. Food Stamp Recipients	INA	400	500	468	439	430	389	322	317	326	476	558
4. Population (03)	10202	10360**	10520**	10683**	10848**	11016**	11187**	11360**	11536**	11715**	11896	12080**
5. Taxable Oil Prod. (26)	59474	INA	61055	57758	60752	67126	65877	65147	64877	61435	57362	INA
6. Value Tax Oil (10)	153803	INA	169067	186486	320866	505417	480946	471360	515467	569238	944173	INA
7. Taxable Gas Prod. (27)	13205	INA	16810	15514	16976	12067	9890	8564	9362	24825	27669	INA
8. Value Tax Gas	1809	INA	2020	2148	3247	2773	4492	4813	5727	47038	56922	INA
9. Bentonite Prod. (1)	746950	670845	685482	768258	927854	890518	1056426	1143918	1079136	1449483	1460000	INA
Calendar Years	**1970**	**1971**	**1972**	**1973**	**1974**	**1975**	**1976**	**1977**	**1978**	**1979**	**1980**	**1981**
10. Births (03)	169	159	172	173	187	194	197	224	202	249	259	INA
11. Deaths (03)	121	107	118	84	101	94	104	105	120	124	110	INA
12. Marriages (03)	84	100	102	103	116	104	141	115	104	102	127	INA
13. Divorces (03)	32	33	46	40	57	48	64	54	53	53	88	INA
Calendar Quarters	**1/79**	**2/79**	**3/79**	**4/79**	**1/80**	**2/80**	**3/80**	**4/80**	**1/81**	**2/81**	**3/81**	**4/81**
14. Hotel, Motel & Camp Sales Use Tax (05)	3809	5230	8946	7547	5112	4678	11512	5903	4834	9185	11094	13000*
15. Liquor Sales (05)	92338	119976	111460	156711	103064	110357	126205	158960	106756	120824	124292	161632
16. Net Collections Sales & Use Tax (05)	305372	319971	347905	[illegible]331	518678	570459	520625	507582	498602	583822	534174	590000*
Fiscal Years	**1970**	**1971**	**1972**	**1973**	**1974**	**1975**	**1976**	**1977**	**1978**	**1979**	**1980**	**1981**
17. State Board of Equalization Valuations (05)	22202099	21375876	22266798	23218320	25259306	39928127	58331403	56773420	57009938	62300048	74039456	112993054
18. Locally Assessed Property Valuations (05)	17889155	18132429	18038131	18529141	191964120	18869665	21221753	22375875	22121398	23747938	249863[illegible]	27272012
19. Locally Distributed Cigarette Tax (-5)	43447	46478	46768	52056	59903	52474	56592	56802	56157	58272	59770	61513

* Estimate based on October and November Data with December datum forecast from historical trends

** Estimate based on growth from 1970 to 1980 census (1.548% per year)

(26) Hundreds of Barrels (27) Hundreds of MCF

HISTORY

Man has been present in Big Horn County for a great many years. The Hanson archeological site, located north of Shell Creek, near the Sheridan County line, has provided evidence of human habitation over 10,000 years ago. Other sites, including Big Horn Canyon, Granite Creek Rockshelter, Medicine Lodge Creek and Paint Rock Creek, provide evidence of continuous habitation over the past 10,000 years. Artifacts discovered at these sites include pictographs, teepee rings, firepits, animal bones and projectile heads. The most well-known site in Big Horn County, the "Medicine Wheel," has provided a basis for much speculation as to its function. To date, no definitive answer has been provided.

The first recorded visit to Big Horn County by white men was the Lewis and Clark expedition in 1803-04. After Lewis and Clark, fur traders opened a thriving trade with the Crow Indians, who regarded the basin as their domain. Perhaps the most famous of the fur traders was John Colter, who arrived in 1807.

The first important economic move came in 1879, when Charles Carter brought cattle in to the area. Other cattlemen soon followed suit: Henry Lovell in 1880, Richard Ashworth, Otto Franc and Henry Belknap in 1881, Captain R.A. Torrey in 1882 and Colonel W.D. Pickette in 1883. Along with the cattlemen came homesteaders, a number of whom moved in between 1881 and 1886.

By the final decade of the 19th century, irrigation was common, and the big cattle ranches were being confronted by the homesteader and the sheepherder. As more sheepmen moved in to the area, it became apparent that the land was better suited to sheep than cattle.

Big Horn County was created by the 11th Wyoming Territorial Legislative Assembly on March 12, 1890. At the time, it was composed of the entire Big Horn Basin. In 1896, the first Board of Commissioners was elected. On June 4, 1897, the county became part of the new state of Wyoming. In 1909, Park County was split off from Big Horn County, and, in 1911, Washakie and Hot Springs counties were likewise created.

THE PEOPLE

In 1970, the population of Big Horn County was 10,202. The age profile of this population was somewhat unusual in that, although the number of children was relatively large, the number of young adults was relatively small. In fact there were more persons aged 60 to 64 than 20 to 24.

By 1980, population had increased 16.6 percent to 11,896 persons. The age profile had also changed. In 1980, the number of young adults had increased so that no longer were there fewer 20 to 24 year olds than 60 to 64 year olds. Still, as compared to the rest of the state, where 20 to 34 year olds compare 30 percent of the population, in Big Horn County they make up only 21.3 percent of the population. This is reflected in the median age recorded in the state of 27.1 years and in Big Horn County of 29.7 years.

With the population increase, increases in births, marriages and divorces have been recorded. In the past 10 years, they have increased 4.36, 4.22 and 10.65 percent per year respectvely. Interestingly, the number of deaths has changed very little.

Also on the increase are Aid to Families with Dependent Children (AFDC) grants and Food Stamp recipients. Since 1972, the number of AFDC grants has increased by 76.1 percent, or an annual rate of 6.5 percent. At the same time, AFDC payments in Big Horn County increased by 377.7 percent, or an annual rate of 15.91 percent. The number of Food Stamp recipients also increased, but at a much slower rate. In 1981, 39.5 percent more persons received Food Stamps than in 1972. This represents an annual growth rate of 3.8 percent per year.

The 907 AFDC grant of 1981 represent 7.5 percent of the county's population. Statewide, the figure is somewhat lower, at 6.7 percent. This reflects the somewhat lower than average income in Big Horn County. In 1979, Big Horn County per capita income was $6,684, or $2,940 lower than the state figure of $9,620.

NATURAL RESOURCES

Minerals

A great many minerals are present in Big Horn County. Minerals such as alum, argonite, gold, marble, titanium, thorium and other rare earths have been reported to occur in Big Horn County. Still others, including dolomite, glass, sand, lead, pumice and uranium, are reported present in potentially recoverable quantities. At present, several other minerals are being developed. Brick clay, bentonite, gypsum, and sulfur are all being produced. In the past, uranium was mined, but is not being mined at present.

Fossil Fuels

Big Horn County is the site of some of the earliest oil and natural gas discoveries in Wyoming. As early as 1884, oil seepage was discovered in Big Horn County. Producing wells were drilled by 1888, and development continued over the next several decades. By the 1950s, thousands of barrels per day were being pumped. In 1975, over 20 different fields were producing oil and natural gas in Big Horn County.

Coal is also present in commercial quantities. Two separate fields, one near Basin and one south east of Basin, have produced coal in the past. At this time however, no coal is being produced in Big Horn County.

Water

As in most Wyoming counties, water is an important natural resource for Big Horn County. Fortunately for the farmers and ranchers of the county, several good-sized streams flow through the basin. The major stream is the Big Horn River, which flows south to north, more or less in the center of the county. All three of the main towns in Big Horn County are located on the banks of this river or one of its tributaries. Other streams flowing through the county are the Greybull River, the Shoshone River and Shell Creek. All of these streams flow into the Big Horn River. Nearly 50 percent of the annual flow occurs during the months of May, June and July. In order to preserve water, a number of spreader dams and small reservoirs have been constructed. In order to facilitate the distribution of water for agriculture, several canals were constructed (beginning with the "Farmers" or "Bench" canal near Burlington in 1896) in Big Horn County under the Carey Act of 1894. Other canals include the Big Horn Canal near Basin, the Lovell Canal near Lovell, and the Shell canal near Shell.

ECONOMY

Traditionally, agriculture, in the form of cattle or sheep ranching and sugar beet farming, has been the mainstay of the economy in Big Horn County. In 1970, over 30 percent of the income generated and over 20 percent of the proprietors and workers in Big Horn County were agriculture based. By 1979, a dramatic decline in the importance of agriculture as an economic sector had occurred, with less than 8 percent of the income generated by agriculture, and only 17.5 percent of the employees and propriators involved in agriculture.

While the percent of income due to agriculture has been declining, the inflating prices commanded by minerals and fossil fuels have pushed the income generated by mining from under 9 percent of the total in 1970 to over 25 percent of the total in 1979. While fossil fuel production has grown little in volume, the value has increased dramatically. The ongoing demand for bentonite has pushed production ever higher, with 1980 production up by 94 percent over 1970, or about 6.9 percent per year. The mineral industries in Big Horn County seem destined to continue their growth. With abundant untapped resources, as well as some which have been in production for almost a century, this sector is well entrenched and expanding rapidly.

The third major sector of the economy in Big Horn County is the government. In 1979, over 17 percent of all income in the county was generated by the government. At the same time, the government provided over 19.5 percent of the jobs in Big Horn County. Very little change in the size of the government contribution to Big Horn County's economy has been recorded from 1970 to 1979.

Figure 12: Big Horn County; Age by Sex in 5-year Age Groups, 1970, 1980.

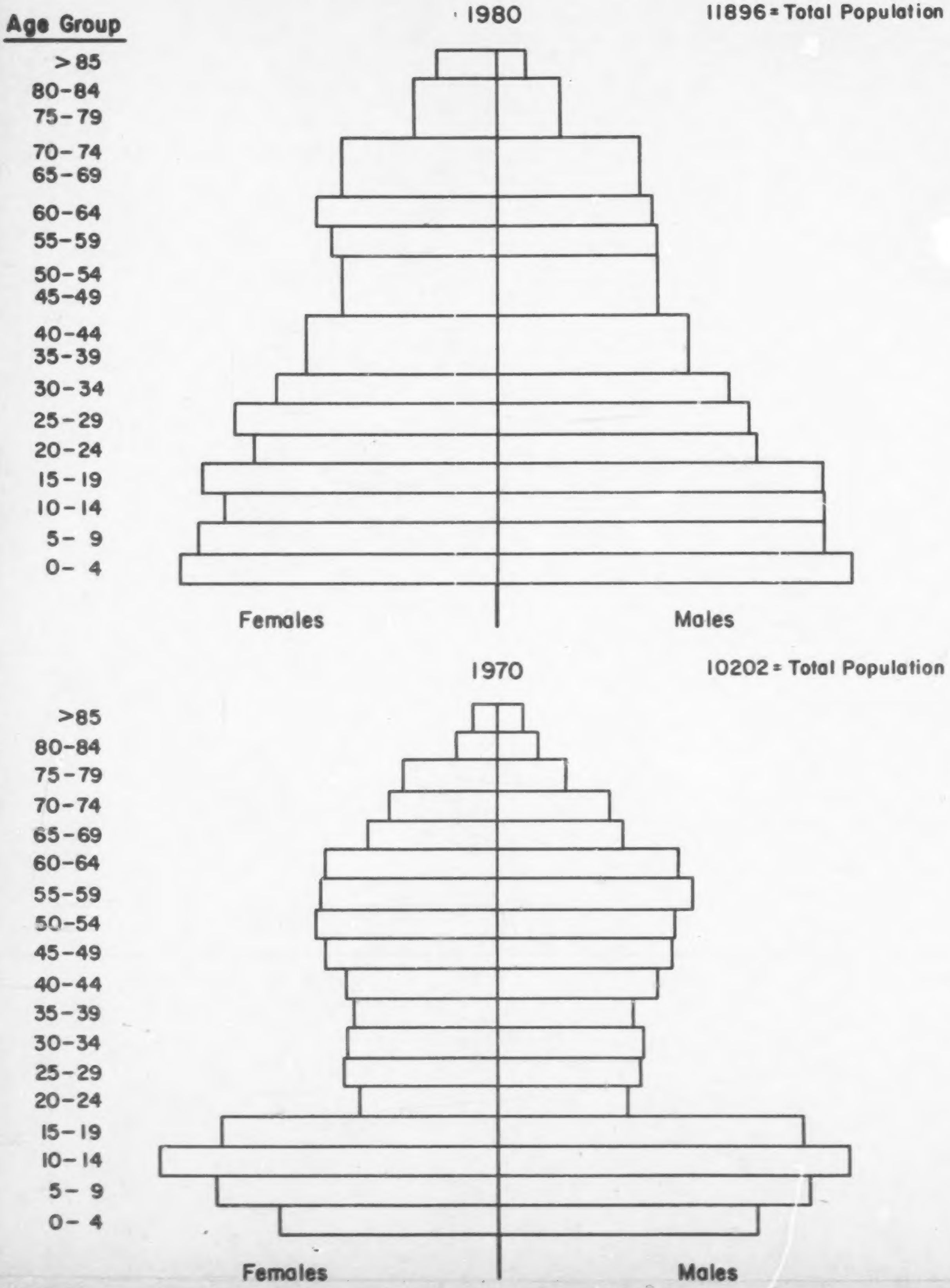


Table 13: Personal Income by Major Source*

Source	Wyoming 1979		Big Horn County 1979		('000's) Big Horn County 1970≠≠	
	$	% of Total	$	% of Total	$	% of Total
Farm	122304	3.48	4493	7.60	8947	31.74
Ag Serv., For., Fish, and Other	11765	.34	D≠		INA	
Mining	846445	24.12	14,900	25.19	2491	8.83
Construction	434772	12.39	6342	10.72	1654	5.87
Manufacturing	177123	5.05	5051	8.54	2614	9.27
Transportation & Public Utilities	348261	9.92	5800	9.81	2724	9.66
Wholesale Trade	152027	4.33	D≠			
Retail Trade	344783	9.82	3940	6.66	2485δ	8.81
Finance, Insurance & Real Estate	120475	3.43	1765	2.98	591	2.10
Services	391429	11.15	2984	5.05	D≠	
Government	560224	15.96	10417	17.61	4844	17.18
Total	3509608		59147		28192	

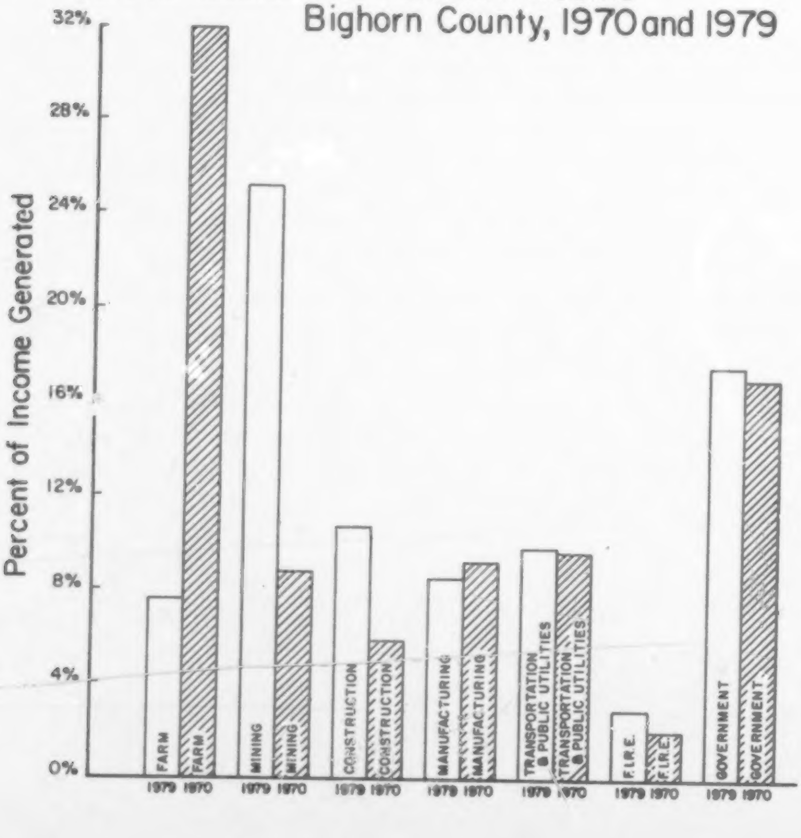
* REIS Data

≠ Not shown to avoid disclosure of confidential information, data is included in totals

δ Sum of Wholesale and Retail Trade

≠≠ Included in total 'other' not shown

Figure 13: Sources of Personal Income Bighorn County, 1970 and 1979



The three major sectors of the Big Horn County economy, then, are agriculture, mining and government. In 1979, they accounted for over 50 percent of the jobs available. In addition, tourism can be considered an important contributor to the county's wealth. However, most travelers do not have Big Horn County as their primary destination, but are heading for Yellowstone National Park or other major tourist attractions. Only the southern part of the Big Horn Canyon National Recreation Area could be considered a well-known attraction of Big Horn County. The usual indicators of tourism (hotel, motel and camp sales and use tax) show the expected seasonal pattern, but when net sales and use tax are examined, the pattern is totally submerged and no seasonal trend is readily apparent.

OUTLOOK

Big Horn County is a sparsely populated area. In 1970, less people lived in Big Horn County than in 1930. By 1980, the number of residents had reached a level greater than the 1930 population, but still less than the 1940 population. With continued high demand for minerals, the population should continue to increase. Big Horn County has an abundance of recoverable minerals, only some of which are currently being extracted. As the demand for these minerals increases, some new deposits will be developed, leading to an increase in employment and population. As of 1980, no town in Big Horn County was considered "urban" (over 2500 persons). With continued mineral development, however, urban areas could arise by 1990.

The most immediate prospect for expanding the economy of Big Horn County lies with Brent Petroleum Industries of Canada. Brent Petroleum is about to complete a polymer plant northeast of Greybull. The plan is to provide polymer for enhanced recovery of shallow, heavy oil. This oil has been known to exist for some time, but recovery was not economical until oil prices were allowed to rise. While the polymer plant is only a pilot project, chances for expansion appear good, with the prospect that many new jobs will be created.

Key to Units Code

01	THOUSAND BOARD FEET
02	PERCENTAGE
03	NUMBER OF INDIVIDUALS
04	THOUSAND KILOWATT HOURS
05	DOLLARS
06	MILLIONS OF DOLLARS
07	BILLIONS OF DOLLARS
08	THOUSANDS OF DOLLARS
09	NUMBER OF HOUSEHOLDS
10	HUNDREDS OF DOLLARS
11	SHORT TONS
12	THOUSAND SHORT TONS
13	MILLION CUBIC FEET PER DAY
14	THOUSAND BARRELS PER DAY
15	INDIVIDUAL VISITORS
16	GALLONS
17	AVERAGE DAILY NUMBER OF VEHICLES
18	MILLION MILES
19	FATALITIES PER MILLION MILES
20	THOUSAND CUBIC FEET
21	KILOWATT HOURS
22	THOUSANDS OF GALLONS
23	VISITOR DAYS USE
24	NUMBER OF INDIVIDUAL CRIMES REPORTED
25	HUNDREDS OF THOUSANDS OF DOLLARS
26	HUNDREDS OF BARRELS
27	HUNDREDS OF MCF
28	$ PER TON
29	$ PER MCF
30	$ PER BARREL

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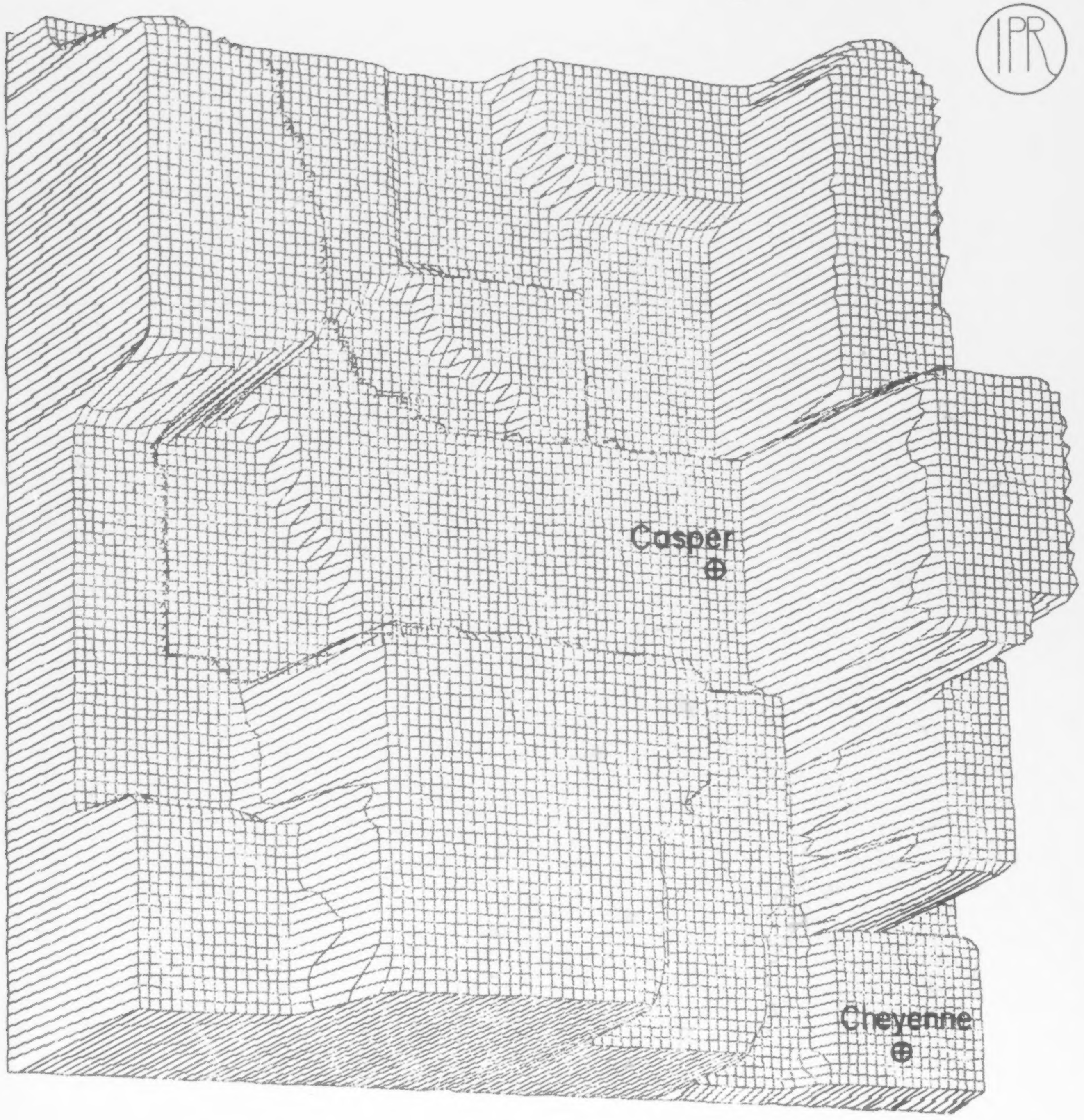
Wyoming Quarterly Update



Percentage change in County Populations from 1970 to 1980.

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Wyoming Quarterly Update (WQU) represents the efforts of the Institute for Policy Research (IPR) at the University of Wyoming to provide improved data access services. The data presented in WQU are assembled from secondary sources, such as government agencies and private industry. The staff of IPR greatly appreciates the ongoing cheerful cooperation of each of the data sources listed in the bibliography.

WQU provides current economic indicators and timely, easily accessible data. Most of the data published in WQU are updated quarterly with the most current numbers. The complete data sets from which WQU originates are maintained, together with documentation, in machine-readable form by IPR. Readers are encouraged to contact IPR to find out how to gain access to and use the on-line data system. Many data series, such as gasoline sales and taxation data, span more than 30 years. Numerous other series cover 20 years or more.

Efforts to expand the subject and geographic detail (county level data) of data sets will be made continuously. Featured for the second time in this edition are county profiles. Current data, graphics, and discussion are presented for Fremont, Lincoln, and Uinta counties in this edition. Each subsequent edition of WQU will feature two to three county profiles. At that rate, each Wyoming county will be covered every two to three years. Current plans are to cover Laramie and Natrona counties in the next WQU (September, 1982). No firm plans have been made to present particular counties in the December, 1982, WQU. Suggestions by readers will be considered in making that decision.

The cover page of each edition features a contour map which illustrates the geographic distribution of a particular variable. This edition features a contour map which contrasts county population growth rates from 1970-80. For instance, the lowest areas correspond to the counties which grew the least during that decade.

First-time readers of WQU should refer to the "Format" (last page) for an explanation of numerical codes and table formats.

For additional information, to make suggestions, or to request data, contact WQU project manager John Merrifield at:

The Institute for Policy Research
University Station, Box 3925
Laramie, WY 82071
(307) 766-5141

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Corrections to Spring Quarterly Update

pg 23: Series 2, 3/81 datum is 282,226

pg 27: Bottom table heading should be: Per Capita Transfer Payments, Wyoming Counties and State

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Project Manager.........John D. Merrifield
Editorial Advisors.........Shelby Gerking
G. Fred Doll
Copy Editor.........Kate Missett
Word Processing.........Lorri Fuhs Pedersen
Editorial Assistance.........Beth Daniels
Research Aides.........Ruth Tebbutt
Julie Gizinski
Graphics
Cover Page, Figure 12, 14, 16, Maps 1-2.........University of Wyoming Graphic Arts Services
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Perspective on the Wyoming Scene

by John Merrifield

As the second quarter of 1982 comes to an end, mixed signals are being sent by the nation's economy. The administration backed away from an earlier promise by Secretary of the Treasury Donald Regan that the economy would come roaring out of the recession during 2/82, when both Secretary Regan and chief economic advisor Murray Wiedenbaum conceded that the recovery was slow in coming (CBS Radio News, 6/9/82). Difficulty in predicting the near-term future of the economy is compounded by a number of facts. No other post-war slump has been characterized by such implacably high interest rates and such a rapid plunge in the rate of inflation. Economists are unsure how consumers will use the extra cash they will begin to receive in July when the first of two ten percent federal income tax cuts and the social security cost of living adjustments take effect. Congress is having difficulty producing a budget resolution, and the closeness of the votes on the various alternative budgets suggests that the nonbinding resolution may be difficult to maintain in the face of intense election-eve lobbying by special interest groups.

Public opinion polls echo that uncertainty, as well as despair engendered by the current poor economic conditions. According to a June 11 United Press International (UPI) dispatch, a May 25-30 Lou Harris poll showed that 49 percent of Americans felt that the economy was in a depression, up from 34 percent voicing the same opinion in March. In a University of Michigan Poll reported by US News and World Report (USNWR) on May 24, 52 percent of the respondents expected unemployment to get worse and only 14 percent expected it to get better. A Gallup Poll, also reported in the May 24 USNWR, showed that 52 percent of the respondents expected to receive no benefits from social security upon retirement, and an additional 14 percent expected lower benefits.

The gloomiest economic news in recent months has been the continued increase in the unemployment rate. The 9.5 percent rate in May and the 9.4 percent rate in April were both post-war records (Business Week, 6/28/82). To put as good a face as possible on the hardship indicated by those figures, it should be noted that the unemployment rate usually lags by several months the beginning and end of recessions. That phenomenon results primarily because of the substantial investment made by most employers in employees through training. For that reason, employers are slow to lay off employees at the beginning of recessions, and are reluctant to hire workers until a recovery appears to be brisk and long-term. Another reason why the unemployment rate is slow to respond to a recovery from recession is the ability of many employers to expand output substantially without increasing their workforce. That can occur at the end of a recession, because many valuable employees are put on reduced work schedules, instead of being laid off while the recession is underway. As the recession ends, those underemployed persons are returned to full-time employment status before hiring takes place. If (as data presented later may indicate) the recession has bottomed out, an improvement in the unemployment rate could be close at hand.

High interest rates continue to cast a long shadow over the prospects for a sustained, robust economic recovery. Citibank's move to lower the prime interest rate to 16 percent on May 25 (CBS Radio News) was not followed by any other banks, and on June 15 (UPI) it rejoined other banks at 16.5 percent. As explained in the last WQU, the difference between the interest rate and inflation, known as the real interest rate, remains at record high levels. The high interest rates are beginning to perpetuate themselves. The demand for credit is remaining high despite the high rates, in part because government and industry are having to borrow to make payments due on earlier loans.

Factory capacity utilization continues its decline as well, but at least the decline from 71.1 percent in April to 70.8 percent in May was a much smaller drop than the plummet from 80.0 percent in March (Wall Street Journal 6/17/82). This may be seen as a sign that the recession is at or near bottom.

Some additional signs of a weak economy are first quarter corporate profits, Gross National Product (GNP), and home mortgage foreclosures. The 17.5 percent plunge in after-tax corporate profits was the second worst drop in the last 28 years (CBS Radio News, 5/19/82). The GNP fell again in 1/82, this time by a 4.3 percent annual rate (CBS Radio News, 5/19/82). The 100,000 home mortgage foreclosures during 1/82 were the most during any quarter since the data were first collected in 1953 (CBS Radio News, 6/1/82). Many bills to aid the housing industry are pending before Congress, and one mortgage subsidy proposal has been attached to an appropriations bill to make it more difficult to veto. According to USNWR (6/14/82) President Reagan will veto it anyway, and Congress will be unable to override it.

Inflation, however measured, was the most significant of the few bright spots in the current economy. At the consumer level, inflation from November through April was only 2.8 percent at an annual rate (USNWR, 6/7/82). At the producer level, inflation was zero in May, the fourth straight month of virtually no increase (UPI, 6/12/82). According to USNWR (5/24/82), more than three-fourths of 2400 corporate buying agents meeting May 9-12 thought prices would remain the same or drop lower in the next six months. A month later (USNWR, 6/21/82), some upward pressures on inflation were beginning to appear. Gasoline prices stopped their decline and then increased 0.9 percent in May (ABC Radio News, 6/22/82). That led the way to a full percentage point jump (12 percent annual rate) in the consumer price index in May. Raw materials' prices increased in May, perhaps prompting the increase in grocery prices early in June. Despite the recent contract concessions by labor, which some expected to result in lower car prices, the three biggest US automakers actually raised some prices. In spite of these recent snags in the inflation picture, it is expected to remain well below levels of the last few years.

While it is the most widely noted economic bright spot, inflation is not the only positive indicator. Housing starts rose 22 percent in May, rising above the one-million unit per year output rate for the first time in months (Wall Street Journal, 6/17/82). Most of the increase came in apartments rather than single-family homes. The government's index of leading economic indicators increased in April for the first time in nearly a year (USNWR, 6/7/82). Domestic new car sales increased by 15 percent in May over April; a good sign, even though much of that was due to special incentives (USNWR, 6/14/82). A final note of optimism was provided by the government's preliminary estimate of GNP for 2/82. The estimated 0.6 percent annual rate of increase in the GNP during 2/82 followed two quarters of decline in the GNP.

Those hints of improvement, along with $8 billion in tax cuts and $3 billion in increased social security payments expected this summer, may foreshadow a recovery in the near future (USNWR, 6/7/82). Although a recovery in any form would be welcomed by most Americans right now, a comeback driven by consumer spending rather than investment might prove to be more damaging than beneficial in the long run. Increased consumer spending, along with increased borrowing and reduced saving, would probably reignite the fires of inflation, and increase or at least maintain current high interest rates. That would in turn snuff out the investment required to modernize the nation's capital stock and assure future prosperity. It is no secret that the success of Reaganomics depends on how people use the tax cut. The President is counting on sufficient increases in saving and investment to offset the inflationary impact of increased consumer spending. If more spending and less saving than the administration expects takes place, the tax cut could become what Novel Prize winning economist Walter Heller has called "the Kemp-Roth inflation rocket" (Wall Street Journal, 2/10/81).

Closer to home, while not immune to the problems plaguing the national economy, Wyoming's economy continues to be the envy of most other states. The Oil and Gas Journal (6/14/82) reports that the slump is taking its toll on oil industry employment. Lower prices and lower demand have reduced exploration activity, even in the booming Overthrust Belt. Instead, producers are turning their attention to increasing production from existing discoveries. A long-run perspective seems to indicate that a transition is underway to more normal rates of growth. Firming gasoline prices and the approach of the 1985 date for decontrol of natural gas prices will keep the oil and gas industry in the forefront of Wyoming's economy.

Another of Wyoming's major industries, coal mining, got a big boost from the US Synthetic Fuels Corporation announcement on June 19 (Casper Star Tribune) that Hampshire Energy's coal gasification plant was a finalist in the negotiating for federal aid. The $2 billion plant would be located near Gillette in Campbell County, and would provide a local market for five million tons of Wyoming coal per year. This announcement is particularly pleasant news in light of the cancellation of plans for similar projects in other parts of the state. It also provides some relief for a recession-weakened coal industry. While most Wyoming coal mines have firm, long-term contracts, and thus have maintained their output during the recession, some mines, especially in southern Wyoming, have not been so fortunate.

Another item of good news for Wyoming's economy is the prediction by the US Travel Data Center that Americans will be taking more summer trips this year than last (USNWR, 6/14/82). However, the impact of increased travel on Wyoming's important tourist industry will be diminished by the expected tight-fistedness of the travelers. Americans reluctant to cancel travel plans in spite of the recession's impact on their incomes may instead cut expenditures by using less expensive lodging and reducing the purchases of nonnecessities, such as souvenirs. Similar behavior patterns were already evident last summer when the recession began. Record tourist traffic experienced at popular destinations such as Grand Teton and Yellowstone national parks was not echoed by full cash registers and sales tax receipts. Since Wyoming's tourists come mostly in private vehicles, the combination of lower gasoline prices and 10 to 13.5 percent increases in air, train, and bus fares could provide the state's tourist industry with an additional boost at the expense of other areas (USNWR, 6/14/82).

The usual seasonal upturn in the economy during the summer, the still faint signs of increasing economic activity, and the expected infusion of tax cut and social security dollars into the economy beginning in July may bring about some sort of recovery from the recession. How strong and how long a recovery is a more difficult question. The arrival of a recovery period, as well as its magnitude and duration, will depend on the course of interest rates, inflation, and events on the international scene. Of major concern is Congress' ability to stick to any budget resolution that eventually passes. If the appropriations bills determining the budget are held in conformance with the budget resolution, even as Election Day approaches, then the public may uphold the budget and not send interest rates and inflation soaring again. Finally, the most important factor continues to be the individual decisions of millions of Americans to save or to spend their tax cuts. Saving and investment is the key to robust, sustained economic growth.

Summer Minerals Outlook

COAL

by Gary B. Glass, State Geologist, Wyoming Geological Survey

Now that production figures are available, it is apparent that Wyoming's 1981 production fell short of the conservative 108 million tons forecast for that year. In fact, the state's coal production was only 102.7 million tons, which is about 7 percent below projected contract demand. We originally estimated that 1980 production would be 12 percent below contract, but our forecast was apparently a year too early as 1980 production actually equaled contract demand. More importantly, growth in production between 1980 and 1981 dipped to a 9 percent increase as compared to an average annual increase of 30 percent per year over the last 10 years. The state's 1981 production level reflects: 1) lowered power plant demands (i.e., many of the plants requested no more than minimum contracted tonnages and in some cases may even have taken less than required by contract), and 2) some contracts, particularly in southern Wyoming, were lost.

Despite the slower growth rate, 1981 marked the 18th consecutive year that Wyoming coal producers have increased their production over the previous year, and held Wyoming's position as the third largest coal-producing state in the U.S. Wyoming's 1981 coal production is now more than 10 times higher than the record tonnage of 9.8 million tons set back in 1945. Forecasting 1982 production, however, is a problem. Assuming that production will increase by at least 9 percent, and there are those who think it will not, 1982 production is forecast at 112 million tons. Our present forecast of 184.5 million tons by 1990, incidentally, could be met with annual increases of 9 percent.

This slowing pace for Wyoming coal development, which was first noted in the last quarter of 1981, shows no signs of a fast reversal. Already two more coal mines have suspended operations in 1982. With the closure of Energy Development's Vanguard No. 2 underground mine, the only remaining underground coal mine in Wyoming is Carbon County Coal Company's Carbon No. 1 mine at Hanna. Medicine Bow Coal Company's Medicine Bow strip mine is the latest mine to close. Both the Vanguard No. 2 mine and the Medicine Bow strip mine were in the hard hit Hanna Basin, where only last year, Arch Mineral Cooperation closed its 3-million ton-a-year Seminoe No. 1 strip mine. Layoffs in southern and western Wyoming coal mines now number more than 550 employees.

Only the Powder River Basin coal mines show any sign of immunity against layoffs. Because many coal mines in the Powder River Basin have never reached their design capacity, these mines are apparently successfully mitigating the sluggish coal market simply by not expanding their work force. Also, the long term contracts, which are typical of the Powder River Basin mines, help insulate that mining district from the current recessionary down-turn.

Coal conversion projects in Wyoming have now dwindled to one. With the shelving of Panhandle Eastern's WyCoalGascoal-to-gas project north of Douglas and Texaco's Lake De Smet coal-to-gas plans, only Hampshire Energy's coal-to-gasoline project near Gillette remains. Hampshire is still awaiting a decision by the Synthetic Fuels Corporation that would guarantee loans and prices for their $2 billion project.

Water needs for this plant are also in the news as Hampshire presently would like to use groundwater from the Fox Hills Sandstone, an aquifer also used by the City of Gillette. Governor Herschler, who has endorsed Hampshire's coal conversion plant, has also volunteered help in securing an alternate water source that would be less likely to adversely affect other groundwater users in the area.

The much awaited Powder River Basin federal coal lease is history. On April 28, 1982, five Wyoming tracts with an estimated 1.171 million tons of coal netted bonus bids, totalling $49,715,225. Bonus bids for the 5 tracts were between $500 and $14,000/acre which equates to 0.95¢ - 8.2¢ per ton, respectively. Three of the tracts were only bid on by companies that had active mines adjacent to the tracts (Amax Coal Company bid on two tracts and Shell Oil bid on one). The high bidder on the largest tract, with an estimated 445 million tons of coal, was Texas Energy. Texas Energy is a subsidiary of Kaneb Services, which is a partner in the Hampshire Energy Coal Liquefaction Project. Neil Butte Company, a group of local ranchers, was the high bidder on the fifth tract with 170 million tons.

The sale, which was conducted under protest of some conservation groups as well as the Northern Cheyenne Indian Tribe, is now also under fire for netting far less than market value. Four of the tracts received single bids at or only very slightly above entry level bids. The fourth tract opened at $25 and closed at $500/acre. However, various groups and individuals are asserting that entry level bids were below fair market value and should have been higher. The U.S. Department of Interior is presently trying to decide whether or not to accept the bonus bids.

It is interesting to note that the controversial bonus bids, which are under so much criticism, are in essence no more than advance royalties, which will later be subtracted from the 12.5 percent royalty that is paid on all new federal leases. It is not clear how fair market value is determined on a bonus bid, as bonus bids are only a measure of how much front-end money a company is willing to put up. As mentioned earlier, these recent bonus bids are 2-8 times the bonus bids paid in the late 1960s and early 1970s. For comparison, the average assessed value of a ton of Wyoming coal has increased less than threefold since 1971.

WYOMING COAL PRODUCTION IN MILLIONS
OF TONS FOR 1980 and 1981[1]

	Production		% of State Production in 1981
	1980	1981	
Powder River Basin			
Campbell	61.5	71.5	70%
Converse	3.8	3.6	3%
Sheridan	4.3	2.8	3%
	69.6	77.9	76%
Green River Basin			
Sweetwater	10.4	11.2	11%
Hanna Basin			
Carbon	9.4	8.5	8%
Hams Fork Region			
Lincoln	4.9	5.1	5%
Bighorn Basin			
Hot Springs	.04	.04	---
TOTAL	94.3	102.7	100%

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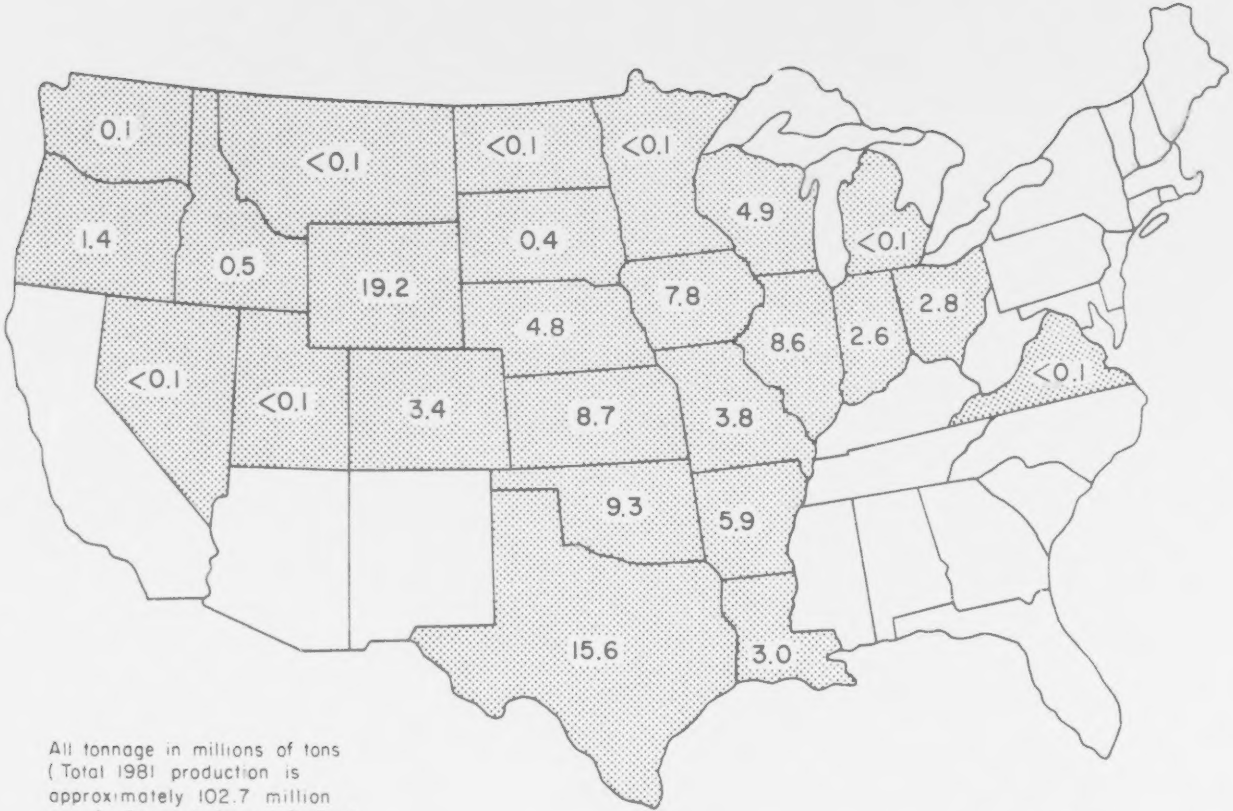
[1] Compiled by Wyoming Geological Survey from Annual Reports of the State Inspector of Mines.

UTILIZATION TRENDS FOR WYOMING COAL[1]

	IN-STATE UTILIZATION			OUT-OF-STATE UTILIZATION			GRAND TOTAL	PERCENTAGE USED OUT-OF-STATE
	Power Plants	Industrial and others	Total	Power Plants	Industrial and others	Total		
1969	2.90	0.40	3.00	0.95	0.35	1.30	4.6	28%
1970	3.30	0.45	3.75	3.00	0.65	3.65	7.4	49%
1971	3.05	0.55	3.60	3.75	0.65	4.40	8.0	55%
1972	4.60	0.50	5.10	5.10	0.70	5.80	10.9	53%
1973	5.70	0.50	6.20	7.80	0.80	8.60	14.8	58%
1974	6.00	0.50	6.50	13.00	1.10	14.10	20.6	68%
1975	6.80	1.10	7.90	14.60	1.30	15.90	23.8	67%
1976	9.00	1.10	10.10	19.50	1.50	21.00	31.1	68%
1977	11.90	1.00	12.90	31.90	1.20	33.10	46.0	72%
1978	11.50	1.60	13.10	44.60	1.50	45.10	58.2	77%
1979	14.20	1.70	15.90	54.40	1.60	56.00	71.9	78%
1980	16.50	1.70	18.20	74.70	1.40	76.10	94.3	81%
1981	17.60	1.60	19.20	82.00	1.50	83.50	102.7	81%

[1] Estimated by Wyoming Geological Survey prior to 1979; 1979-1981 estimated by U.S. Department of Energy, Energy Information Administration.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1.4
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19.2
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7.8
8.6
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<0.1
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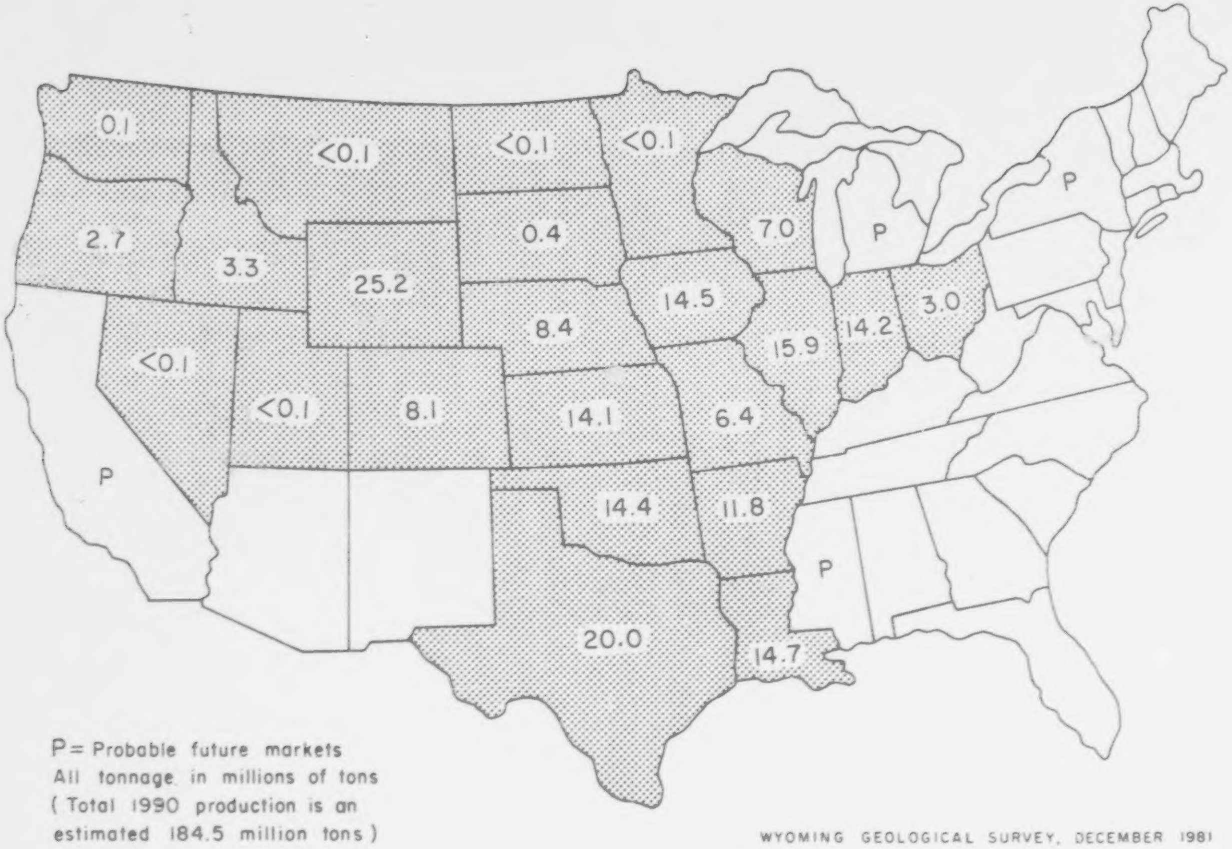
3.4
8.7
3.8
9.3
5.9
15.6
3.0

All tonnage in millions of tons (Total 1981 production is approximately 102.7 million tons). Derived from U.S. Dept. Energy, Energy Data Report DOE/EIA-0125 (81/4Q)

WYOMING GEOLOGICAL SURVEY, 1982

1981 MARKETS FOR WYOMING COAL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2.7
3.3
25.2
0.4
7.0
P
P
14.5
8.4
15.9
14.2
3.0
<0.1
<0.1
8.1
14.1
6.4
P
14.4
11.8
P
20.0
14.7

P= Probable future markets
All tonnage in millions of tons
(Total 1990 production is an
estimated 184.5 million tons)

WYOMING GEOLOGICAL SURVEY, DECEMBER 1981

1990 MARKETS FOR WYOMING COAL

MINERALS

by W. Dan Hausel, Deputy Director, Geological Survey of Wyoming

Summary

Wyoming's mining industry, like the entire U.S. mining industry, continued to plunge into a deepening recession with no economic recovery in sight. Exploration and mining activities were on a decline in the state with nearly every sector of the industry announcing employee lay-offs.

In spite of the poor shape of the economy, diamond and precious metal exploration are anticipated to show some increase in the state during this summer.

Uranium

The summer and fall uranium market continued to look dim with no foreseeable economic recovery. The price per pound of yellowcake took another plunge during May, with NUEXCO quoting average prices of $20.75 per pound, or at a $1.75 per pound decrease from the first of the year.

Uranium inventories are expected to grow world wide, not only because of the present soft market, but also because of new production from rich deposits in Canada and Australia. The new increase in uranium production from the foreign market, along with no new nuclear reactor being built in the U.S., should further depress the uranium industry. Both the U.S. Department of Energy and NUEXCO expect a 25 percent decline in U.S. production during 1982.

Wyoming's industry continued to feel the effects of the weak market. Energy Fuels Nuclear announced that 33 employees would be terminated from their Day Loma property located in the Gas Hills District of Fremont County. The Day Loma property was placed on standby status in late April pending improvements in the market.

Exxon's Highland uranium operations in the southern Powder River Basin announced the layoff of an additional 88 employees on February 1. Underground mining at their Buffalo Shaft was discontinued, while surface mining and milling activities were sharply curtailed. Some uranium production is expected through the end of 1983, although the mine operations will probably be placed on standby after 1983, if no improvement is seen in the market.

Pathfinder Mines Corporation announced that 80 percent of the company's capital stock was sold to Cogema on March 26. Cogema is a wholly owned subsidiary of the French Atomic Energy Commission. The purchasing of Pathfinder Mines by Cogema gave the French firm control of Pathfinder's Lucky Mc open pit mine and mill in the Gas Hills District, the Big Eagle open pit mine in the Crooks Gap District, and the Shirley Basin open pit mine and mill in the Shirley Basin District. Mining and milling of uranium ore at these three properties continued at the present depressed pace.

To date, more than 3,000 employees of Wyoming's uranium industry have lost their jobs.

Trona

Trona mining and refining in the Green River Basin declined with a slackening demand for soda ash. The lower demand for the soda ash product is tied directly to the automobile and housing industries, major users of soda ash for glass manufacturing.

Allied Chemical laid off 50 employees on April 1, which followed the layoff of 32 employees from FMC Corporation earlier this year.

On the brighter side, Tenneco continued with its plans to open their new mine and trona refinery located west of Green River. The Tenneco facility is expected to employ as many as 400, and to produce more than 300,000 tons of ore this year.

Bentonite

The bentonite industry also showed signs of the weak economy. Bentonite demand was down during the first quarter of the year which resulted in the layoff of 45 employees at Dresser Minerals plant north of Greybull. The bentonite industry of Wyoming is heavily dependent upon the iron ore, oil, and gas industries for their business. The iron ore industry purchases bentonite to pelletize their ore, and the oil and gas industry uses bentonite as a drilling mud.

The outlook for bentonite production for this summer is to show some production increase with increasing oil and gas exploration activity; however, the growth of the bentonite industry can be expected to be weak due to the depressed state of the iron ore industry.

Iron Ore

The iron ore industry continued at a depressed rate nationwide. Closer to home, U.S. Steel's Atlantic City iron mine, located on the southwestern tip of the Wind River Range, announced that it would shut down mining operations for at least six weeks, for scheduled maintenance, and to reduce iron ore inventories stockpiled at the company's Geneva Smelter in Provo, Utah. The Geneva Smelter is presently operating at about one-third capacity, following the shutdown of U.S. Steel's Iron Springs Mine in Utah.

The operations at Atlantic City are somewhat diversified. U.S. Steel recently signed a contract to deliver 200,000 tons of waste rock to Rock Springs from their Atlantic City Mine.

Diamonds

Diamond exploration activity in Wyoming is continuing at an increased pace this summer, in spite of a present worldwide diamond slump. Much of the exploration activity is centered in the Laramie Range, Wyoming, and in the Front Range, Colorado, where several diamond-bearing kimberlites were discovered during the last decade.

Two firms, Cominco American and Superior Minerals, are operating diamond extraction pilot plants in Colorado, to test the kimberlite pipes for commercial mineralization. A number of other companies have expressed interest in conducting diamond exploration programs in Wyoming and Colorado during this summer.

Other activities include research and exploration for the kimberlite pipes by the Geological Survey of Wyoming. The State Geological Survey recently was awarded two grants to search for the elusive diamond-bearing intrusives. One grant will be conducted as a cooperative study with the University of Wyoming Geology Department, and will attempt to develop rapid methods to search for kimberlite. The second grant will fund stream sediment sampling surveys used to search for kimberlite.

Precious and Base Metals

Exploration activities for precious and base metals are expected to increase in Wyoming this summer. Numerous companies are planning to send exploration groups to search for the metals.

In addition, the Geological Survey of Wyoming was awarded a grant by the University of Wyoming Engineering Department to search for a strategic metal deposit that may be amenable to in-situ leaching research by the University.

OIL AND GAS

by Alan J. VerPloeg, Staff Petroleum Geologist, Geological Survey of Wyoming

Recently information from the State Oil and Gas Conservation Commission's office indicates that the deep gas trend in the Big Piney-LaBarge area (discussed in the Winter 1982 update) appears to be much larger than originally thought. Seven units are now considered part of the 20-25 miles wide and 25 miles long trend including: Riley Ridge, North Riley Ridge, Tip Top, Fogarty Creek, Lake Creek, Graphite, and Hogsback. The gas which is produced from the Madison and Big Horn formations contains 70 percent CO_2, 20 percent methane, 4 - 10 percent H_2S, and 1 - 2 percent helium. Four gas plants are now on the drawing board: Exxon's two plants at 600 million cubic feet per day each; Northwest Pipeline's 400 million cubic feet per day; and American Quasar's 800 million cubic feet per day plant. Total anticipated cost for three of the four plants is 2.5 billion dollars. Reserves are estimated at between 7-35 trillion cubic feet of methane gas, not including the CO_2. In conjunction with the above development, a new town would need to be constructed to accommodate approximately 4500 workers.

Williams Exploration has indicated it may open a new gas field in Teton County, the first field in the county. An exploratory well in Granite Creek Canyon, 18 miles southeast of Jackson, shows signs of gas in the Cretaceous Frontier Formation. This, along with the potential exhibited by an adjacent well which is now shut-in, make the area appear quite promising.

Activity in the Overthrust Belt continues with one new field discovery and a new discovery within an existing field. Wainco Oil and Gas completed the B-1 Amoco-Champlin 370 as a discovery flowing 230 barrels of oil per day and 840 million cubic feet of gas per day from the Triassic Ankareh Formation at about 12,500 feet. The discovery named Shurtleff Creek Field, in section 13, T. 17 N., R.119 W., is a separate structure immediately to the west of Ryckman Creek Field. In addition, the Mississippian Madison Limestone was established as another gas pay zone in the nearby Red Canyon field operated by Amoco Production Company. The field already produces from the

Pennsylvanian Weber Sandstone. In a related development, FERC approved plans to construct the 36-inch Trailblazer gas pipeline from the gas plants in Whitney Canyon - Carter Creek Field, 793 miles to Beatrice, Nebraska. The project will cost $550 million and should be completed in late September or early October.

On a pessimistic note, it appears that the Texaco Refinery in Casper and the Husky Refinery in Cody will soon close. The Texaco Refinery has a capacity of 21,000 barrels per day and its closing affects nearly 200 employees. The Husky Refinery's capacity is approximately 12,000 barrels per day and between 115 and 120 employees will be laid off. Related to this, activity in terms of drilling is down in Wyoming with only 137 rigs active as of May 10 as compared to 236 rigs near the beginning of the year. Most observers believe, however, the activity should begin an upswing by fall.

Summer Agricultural Outlook

by Robert D. Carver
University of Wyoming

The good news in the current livestock situation is noted in declining total meat supplies, feedlots that are keeping current with their marketings, positive feeding margins, good moisture conditions, and today's higher prices. The bad news for crop producers is that export activities are still feeling the effects of weak economic activity in the U.S. and worldwide, and last year's large U.S. crops. In addition, the late, cool spring has delayed planting of many crops in major areas of the midwestern and northern plains states.

LIVESTOCK

Choice fed steer prices at Omaha averaged $63.36 per cwt during the first quarter of 1982, compared with $61.99 a year ago. Prices have increased sharply since last December's lows, and have held strong into early June. Although cattle slaughter thus far in 1982 has been up nearly 1 percent from year-earlier levels, the production or supply of beef has been down nearly 2 percent. Thus far in 1982, the average dressed weight of cattle has been running nearly 20 pounds below the same period in 1981. The slaughter in 1982 has contained more cows and nonfed animals in addition to cattle feeders remaining current in fed cattle marketings.

Slaughter lamb prices continued to trend higher throughout May. Prices for old crop slaughter lambs in most major producing areas ranged between $64 and $70 per cwt. Choice and fancy spring feeder lambs were selling at $60-$64 per cwt in early June. In San Angelo, mature slaughter ewes were bringing $20-$25 per head with cull ewes selling for $13 to $17. Stock ewes with mostly solid mouths brought $35 to $40. Choice and fancy replacement ewes that were coming yearlings sold in California for $70 to $75.

GRAINS

Despite the cool wet spring weather in some of the spring wheat areas in the northern plains, a record U.S. wheat crop is forecast for 1981. Weakening world economies and strengthening of the dollar relative to gold, coupled with the anticipated large U.S. crop, overcame whatever strength traders could muster from the Falkland Islands crisis. Early reports from Russia relative to its 1982 crop are somewhat mixed, although it is generally conceded that they will not meet their 1982 goal of 235 million metric tons. Total grain production of 200 million tons is more realistic at this time.

PROSPECTS

Fed cattle prices have probably peaked for 1982. Prices for feeder cattle and light calves did not reflect the magnitude of price increases found in fed cattle this spring. Feeder cattle prices will likely remain stronger longer into the summer than earlier anticipated. However, prices will trail off as we move into fall. Current conditions do not reflect yearling prices to move above last year's $61-$64 per cwt for steers. October-November calf prices will likely mirror year ago levels for most Wyoming producers.

Slaughter lamb prices are expected to hold their strength throughout June. Stronger prices for beef and pork will continue to give support for this market. Feeder lamb prices should hold in the $57-$61 per cwt range most of the summer.

Feed grain prices are expected to hold near the national average loan rate of $2.55 per bushel this fall. Producers should pay close attention to the crop report scheduled for release on July 12, 1982. If estimates indicate less than a 7.0 billion bushel corn crop, this would give strength to corn and other grain prices. An average corn crop would be in the 7.5 billion bushel range.

When looking at all the factors facing agriculture the remainder of 1982, it is difficult to be very optimistic relative to net incomes. Even the most optimistic observers project a sizeable decline in net income for agriculture. Wyoming, with its livestock-dominated agricultural economy, will be facing another dismal income year that will see many producers forced out of business in the coming years.

Airline Deregulation in Wyoming Revisited

by Terry Igoe, Manager
Natrona County International Airport

Airline deregulation and economic conditions have brought us many challenges, but these challenges are not insurmountable. We can meet them, and continue to work for better air service for the small communities of Wyoming.

In passing the Airline Deregulation Act in 1978, Congress told the Civil Aeronautics Board (CAB) to stop regulating the nation's domestic airline industry. Instead, Congress wanted to let competitive market forces decide services and prices.

This act, and events occurring in the airline industry and the economy since its passage, have presented the industry with many challenges, such as:

1. Can essential air service be improved?
2. Can services adjust to the Federal Aviation Administration's (FAA) lot restrictions (the number of landings and take-offs permitted at airports) resulting from the air controllers strike?
3. Can quality air service be maintained without the $60-80 million in subsidies paid to carriers under section 406 of the act?
4. Can small and medium-sized communities be protected from loss of service?

Congress realized in 1978 that, in the early years of deregulation, carriers would experiment with new markets to achieve a more efficient and profitable level of service. In addition, with the new freedom to enter and exit markets, carriers would try to become more efficient by tailoring their routes to their fleets. The result in Wyoming is that small communities previously receiving certificated air service, but without enough traffic to be attractive markets, are likely to lose some or all of their existing service.

The CAB's Essential Air Transportation Program is designed to ensure that the actual demand for air service at smaller communities is met. First, the CAB defines the level of service at small communities that is essential to the communities. Second, if the marketplace does not provide that level of service, the CAB must subsidize airlines to do so.

When an incumbent carrier tells the CAB it intends to leave a community, the CAB immediately looks at the level of service that would remain once the carrier leaves. If that service satisfies the essential air service determination, the CAB will permit the carrier to leave. However, if the community will not receive its essential air service, the CAB makes the incumbent stay in the market until a replacement comes in, and the CAB pays for the carrier's losses during this period.

The procedures for securing a replacement carrier are thorough, and, therefore, take several months to complete. The CAB tells all potential applicants that it is looking for a replacement carrier for the community, and accepts proposals from interested carriers. These proposals include schedules, traffic and revenue forecasts, financial and operational information and, usually, requests for subsidy.

Then, CAB staff members conduct on-site operational inspections of each carrier, review financial reports, and check the carrier's safety and compliance history with the FAA.

The CAB then selects from among the competing applicants the carrier that proposes the best service pattern, weighing such factors as aircraft, jobs, stopovers, frequencies, costs, and the views of the community.

The CAB will only choose a replacement carrier that it finds to be fit and reliable to do the job. A finding of fitness means that the CAB considers the carrier to be operationally and financially sound to provide the service proposed, and that it has the proper regard for federal and state laws and regulations. Most commuters meet the fitness requirements, which are more stringent than the pre-deregulation requirement of merely filing the proper registration forms.

The CAB has a certain amount of control over the specific essential air service routes that it has designated the carrier to serve, but it has no control over the carrier's overall operations.

While the CAB may find a carrier reliable to provide its current or proposed service, the finding of reliability does not provide a guarantee that the carrier will serve the essential air service point for an indefinite period of time. A carrier's longevity depends on many factors besides the quality of its management, the soundness of its finances, and its commitment to provide good service.

It must make business decisions concerning its whole route system, which inherently involve risk-taking. Traffic may decline because of general economic conditions or unanticipated costs, such as high interest rates on purchasing equipment, inflationary pressures that make driving cheaper than flying for short distances, increased fuel costs, and, most recently, slot allocations. Any of these problems could jeopardize a commuter's success.

Airline operations needed to be limited to ensure that the whole system operates safely, but these constraints mean that carriers will sacrifice less profitable routes--usually essential air service routes--in order to serve more profitable markets.

Many communities in Wyoming now receive jet and prop-jet service from regional carriers because this service is being subsidized by the federal government under the 406 subsidy program. However, at the end of March of this year, all appropriations for 406 subsidies (based on service to the communities in the program that enplane more than 80 passengers per day) were eliminated. In addition, Congress has suggested that fiscal year 1982 is the last year that the 406 program will be funded, and the Reagan Administration has not asked for 406 subsidy money in the fiscal 1983 budget.

If section 406 subsidies are no longer available, a number of notices may be filed with the CAB by carriers wanting to leave markets that are no longer economical to serve.

Wyoming has been particularly dependent on 406-subsidized carriers, and the effects of the withdrawal of that subsidy will be especially hard on us. The 406 program, however, was focused on the need of the carriers, not the communities.

Wyoming's communities can survive the loss of section 406 subsidies. There will be some sacrifice and adjustments, but smaller communities will weather the transition to either self-sustaining service or 419-subsidized service (for former 406 markets enplaning less than 80 passengers per day).

We can expect to see small carriers with equipment better suited to smaller cities replacing local service carriers. At communities with low traffic levels, short-haul jets and propjet service will be replaced with more efficient and more frequent commuter service.

With the provision of good economic conditions, the bottom line is that the transition from a combined 406/419 system to solely a 419 system should provide more efficient service to the nation's smaller communities at about half the subsidy cost to the taxpayer.

Figure 1. Energy and Mineral Production (10's)

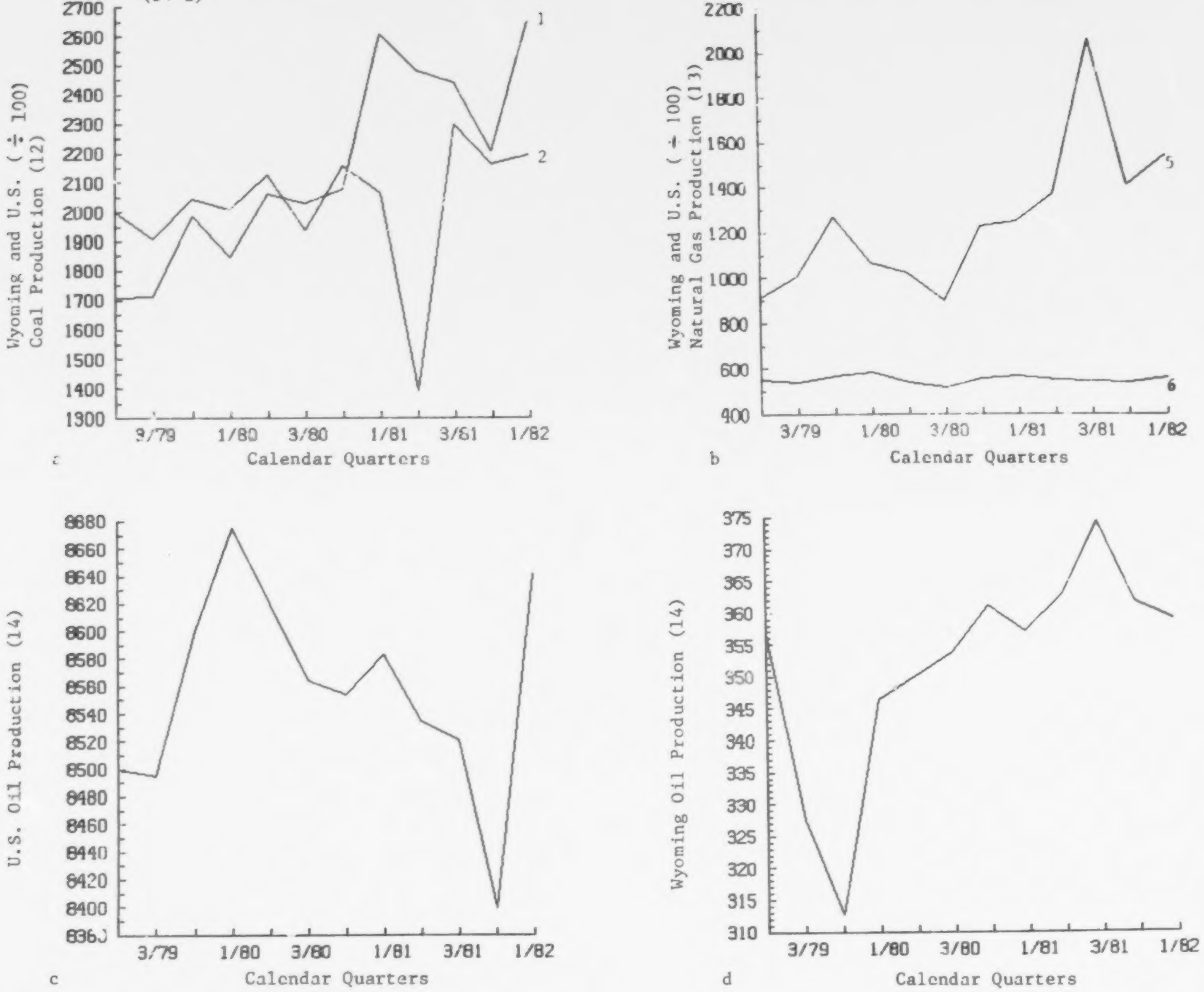

Table 1: Energy and Mineral Production[1]

Calendar Quarters	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81	1/82
1. Wyoming Coal (12)	17073.	17119.	19897.	18487.	20630.	20297.	20799.	26148.	24855.	24495.	22109.	26586.
2. U.S. Coal (12)	200109.	190780.	204300.	200763.	212651.	193760.	216015.	206426.	139125.	230205.	216580.	219743.
3. Wyoming Oil (14)	357.	328.	313.	346.	349.[2]	354.	361.	357.	363.	374.	362.	359.
4. U.S. Oil (14)	8500.	8495.	8600.	8676.	8629.[2]	8565.	8554.	8583.	8534.	8521.	8400.	8642.
5. Wyoming Natural Gas (13)	911.	1006.	1273.	1071.	1028.	901.	1232.	1256.	1378.	2073.	1421.	1545.[3]
6. U.S. Natural Gas (13)	55382.	54114.	57087.	58381.	54300.	51777.	55776.	56771.	55356.	54880.	54298.	560000.[3]

After a 9.7% drop in Wyoming's coal production from 3/81 to 4/81, it increased by 20.2% from 4/81 to 1/82. The reader is reminded that the last four quarter's data are preliminary. After revisions, the rollercoaster trend depicted for Wyoming's coal output in Figure 1a from 4/80 to the present could be smoothed out somewhat. Revisions are not always insignificant. The reported output of Wyoming coal in 1/81 was revised since the spring WQU. The new output figure is 6.8% higher than the old figure. US coal output also rebounded after a 4/81 decline, but only by 1.5%. In fact, the absolute increase in Wyoming's coal output from 4/81 to 1/82 was 1,314 short tons greater than the increase for the entire nation.

Despite the first impression given by Figures 1c and 1d, the production rate for Wyoming and US oil shows no signs of major changes. However, recent reports of reduced drilling activity in response to lower gasoline prices and excessive inventories may signal reduced outputs for the future.

The actual figures for Wyoming and US natural gas production in 4/81 are 8.4% lower and 1.2% higher, respectively, than the estimates printed in the last WQU. The 1/82 estimates are based on recent trends and January's data. Wyoming and U.S. gas production estimates for 1/82 are 8.7% and 3.1% higher, respectively, than the actual output in 4/81.

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[1] First-time readers of WQU should refer to the last page ("Format") for an explanation of numerical codes and table formats.

[2] Datum shown is an estimate. Some data components were not received.

[3] Estimate based on January data only.

Figure 2: Agriculture

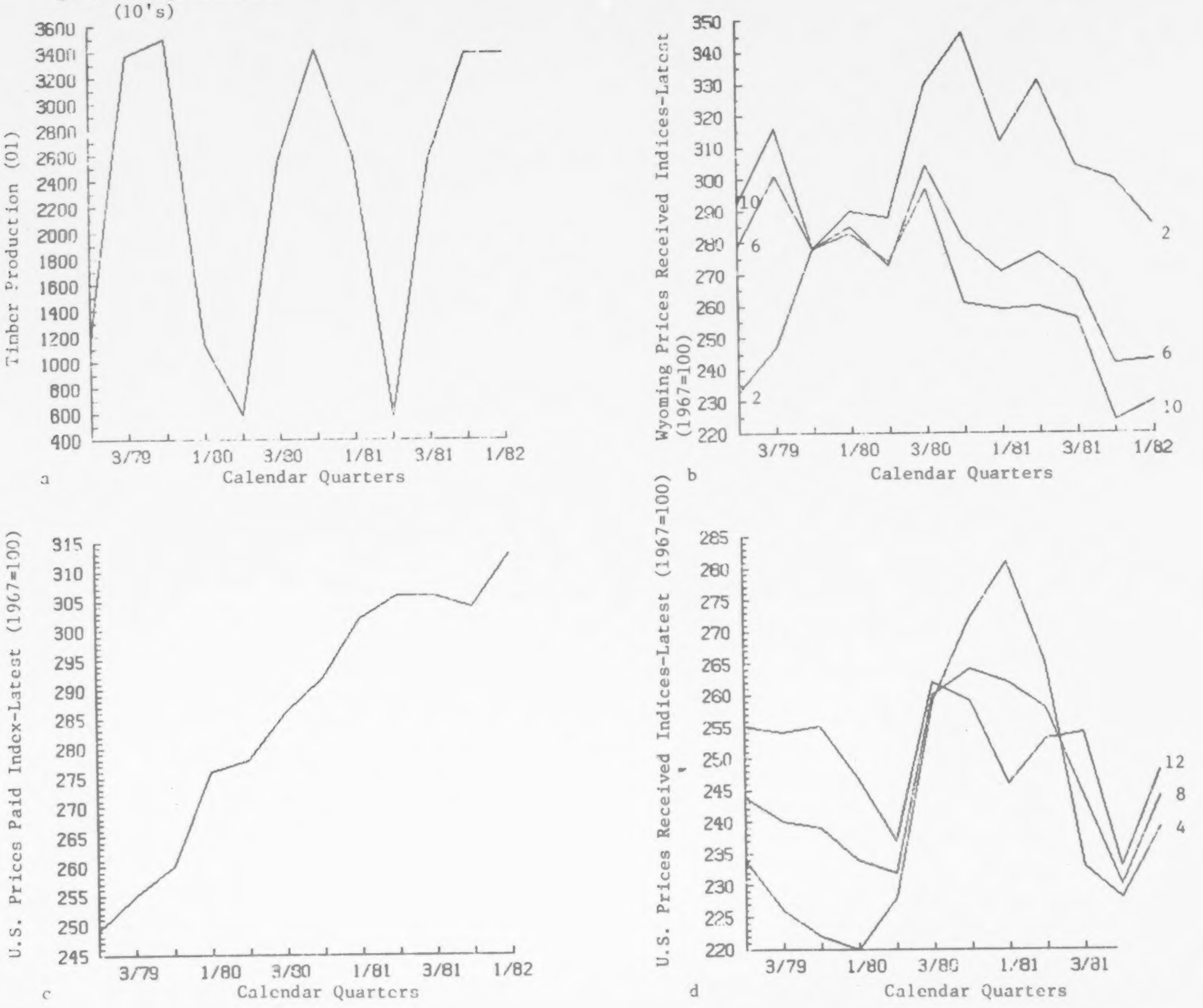

Table 2: Agriculture

Calendar Quarters	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81	1/82
1. Timber Cut in Wyoming National Forests (01)	11712.	33745.	35043.	11372.	5866.	25538.	34190.	25895.	5810.	25613.	33929.	11658.
Price Indices[1] (1967=100)												
2. Wyoming Crops, Prices Received - Latest	233.	247.	278.	290.	288.	330.	346.	312.	331.	304.	300.	279.
3. Wyoming Crops, Prices Received - Average	224.	246.	259.	279.	282.	308.	316.	349.	322.	302.	300.	283.
4. U.S. Crops, Prices Received - Latest	234.	226.	222.	220.	228.	259.	272.	281.	265.	233.	228.	228.
5. U.S. Crops, Prices Received - Average	222.	233.	224.	221.	223.	251.	267.	278.	272.	249.	245.	234.
6. Wyoming, All Commodities, Prices Received - Latest	279.	301.	278.	285.	273.	304.	281.	271.	277.	268.	242.	263.
7. Wyoming, All Commodities, Prices Received - Average	293.	284.	281.	281.	273.	285.	281.	276.	277.	265.	250.	248.
8. U.S., All Commodities, Prices Received - Latest	244.	240.	239.	234.	232.	260.	264.	262.	258.	244.	230.	242.
9. U.S., All Commodities, Prices Received - Average	245.	241.	238.	237.	229.	255.	263.	263.	260.	251.	234.	241.
10. Wyoming Livestock, Prices Received - Latest	292.	316.	278.	283.	274.	297.	261.	259.	260.	256.	224.	258.
11. Wyoming Livestock, Prices Received - Average	314.	295.	288.	282.	272.	282.	274.	255.	264.	254.	235.	238.
12. U.S. Livestock, Prices Received - Latest	255.	254.	255.	247.	237.	262.	259.	246.	253.	254.	233.	254.
13. U.S. Livestock, Prices Received - Average	266.	248.	251.	251.	234.	259.	261.	50.	250.	254.	240.	247.
14. Prices Paid by U.S. Farmers - Latest	249.	255.	260.	276.	278.	286.	292.	302.	306.	306.	304.	313.[2]
15. Prices Paid by U.S. Farmers - Average	248.	253.	258.	273.	276.	284.	291.	300.	305.	306.	305.	313.[3]

The overall average of prices received by Wyoming farmers and ranchers for agricultural commodities sold during 1/82 is up 21 points from 4/81 but 14 points below a year ago. A mild winter has helped boost the index of prices received for livestock 34 points above 4/81, but nevertheless 1 point below 1/81. The index of prices received for crops has declined 1 point from 4/81 and 33 points from 1/81. Graph D illustrates that the indices of prices received by farmers and ranchers in the United States have followed the same trends as the price indices shown for Wyoming farmers and ranchers.

Although the data for this quarter appears to be promising when compared with 4/81, when compared with the data for a year ago we can see that farmers and ranchers are still struggling with high interest rates and low commodity prices.

The Federal Reserve Bank of Kansas, in its May financial letter, says that because farmers and ranchers are facing these financial difficulties along with deteriorating credit "a higher percentage of farmers and ranchers will leave agriculture this spring than last spring according to Tenth District Bankers responding to a survey."

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[1] The index for the last month (latest) of each quarter, along with the average of the three monthly indices of each quarter.

[2] Represents Index of Prices Paid by U.S. Farmers for February, 1982. March Index is not available.

[3] Represents Average Index of Prices Paid by U.S. Farmers estimated from January and February, 1982 data. March Index is not available.

Figure 3: Tourism

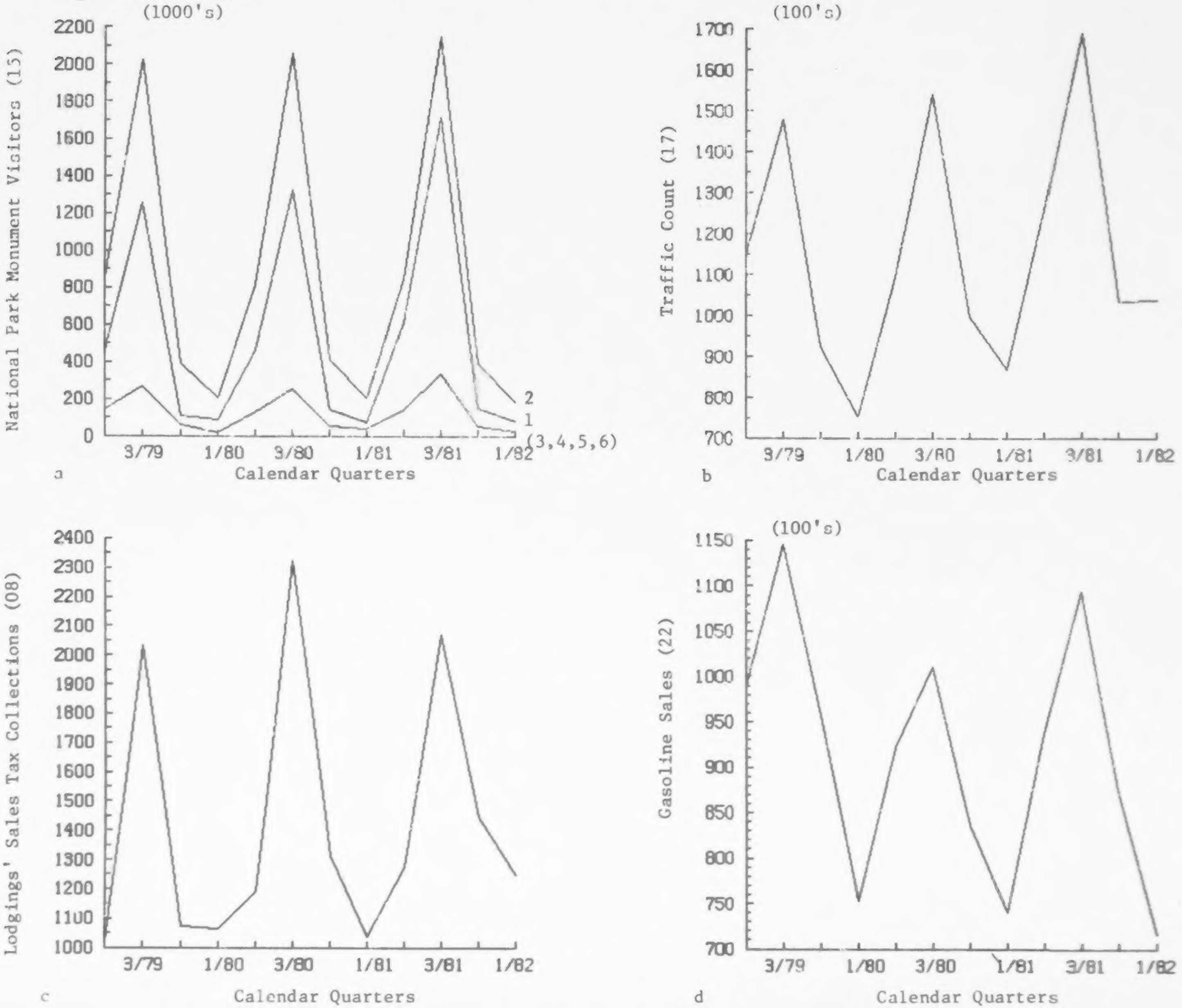

Table 3: Tourism

Calendar Quarters	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81	1/82
National Parks and Monuments												
1. Yellowstone (15)	458095.	1251088.	112061.	89609.	459974.	1323837.	144039.	74693.	609642.	1715175.	149682.	82758.
2. Grand Teton (15)	854618.	2023084.	389457.	205415.	814813.	2055989.	412817.	206147.	847464.	2147775.	393843.	185935.
3. Devil's Tower (15)	65754.	140701.	12606.	7600.	51992.	144042.	12346.	13425.	63064.	205660.	18159.	9425.
4. Fossil Butte (15)	3612.	8984.	1404.	91.	2864.	6857.	1421.	339.	3795.	7769.	1018.	596.
5. Fort Laramie (15)	29733.	64685.	7236.	3630.	27621.	52608.	6337.	6309.	40192.	64598.	10190.	5037.
6. Big Horn[1] NRA-South (15)	44483.	54125.	37334.	10564.	45481.	49499.	35422.	18509.	34846.	56566.	27820.	21000.[2]
Other Tourism Indicators												
7. Traffic County (17)	115056.	147903.	92168.	75203.	109530.	154224.	99772.	86957.	125992.	169095.	103438.	103864.
8. Hotel, Motel, and Camp Sales Tax (8)	1015.	2031.	1074.	1064.	1189.	2326.	1315.	1036.	1272.	2073.	1447.	1247.
9. Gasoline Sales (22)	98986.	114513.	95742.	75338.	92212.	101005.	83626.	74027.	93721.	109335.	87500.	71669.[2]

Visitation data for the National Parks and Monuments continue their seasonal trend downward from the surge during the summer months. Three of the six tourist attractions in Wyoming did accommodate more visitors in 1/82 than in 1/81: Yellowstone (+9.75%), Fossil Butte (+43.12%), and Big Horn NRA-South (+11.86%). It is difficult to say at present if these increases are due only to differences in weather or if some economic factor is involved. Lower gasoline prices and glimmers of business recovery do have the tourism industry hoping for a revival in their business, but the effects will not be evident until next quarter.

Consistent with the visitation data are the data for sales tax collections from hotel, motel, and campground operators and the data for gasoline sales. Gasoline sales are down 18.09% from 4/81, despite a slight 0.41% increase in the traffic count in 1/82. A 3.19% decline in gas sales is seen in 1/82 when compared to 1/81. The lodgings' sales tax collections data for 1/82 are 13.82% below 4/81, yet 20.37% above the dollar amount given for 1/81. The 20.37% increase in the hotel, motel, and camp sales tax collections is 13.6 percentage points higher than the 6.77 percent annual inflation rate present in Wyoming from 1/81 to 1/82.

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[1] Big Horn N.R.A. is only partially in Wyoming. Only visitation data for the Wyoming part is shown.

[2] Estimated from January and February data.

Figure 4: Employment and Labor
(100's)

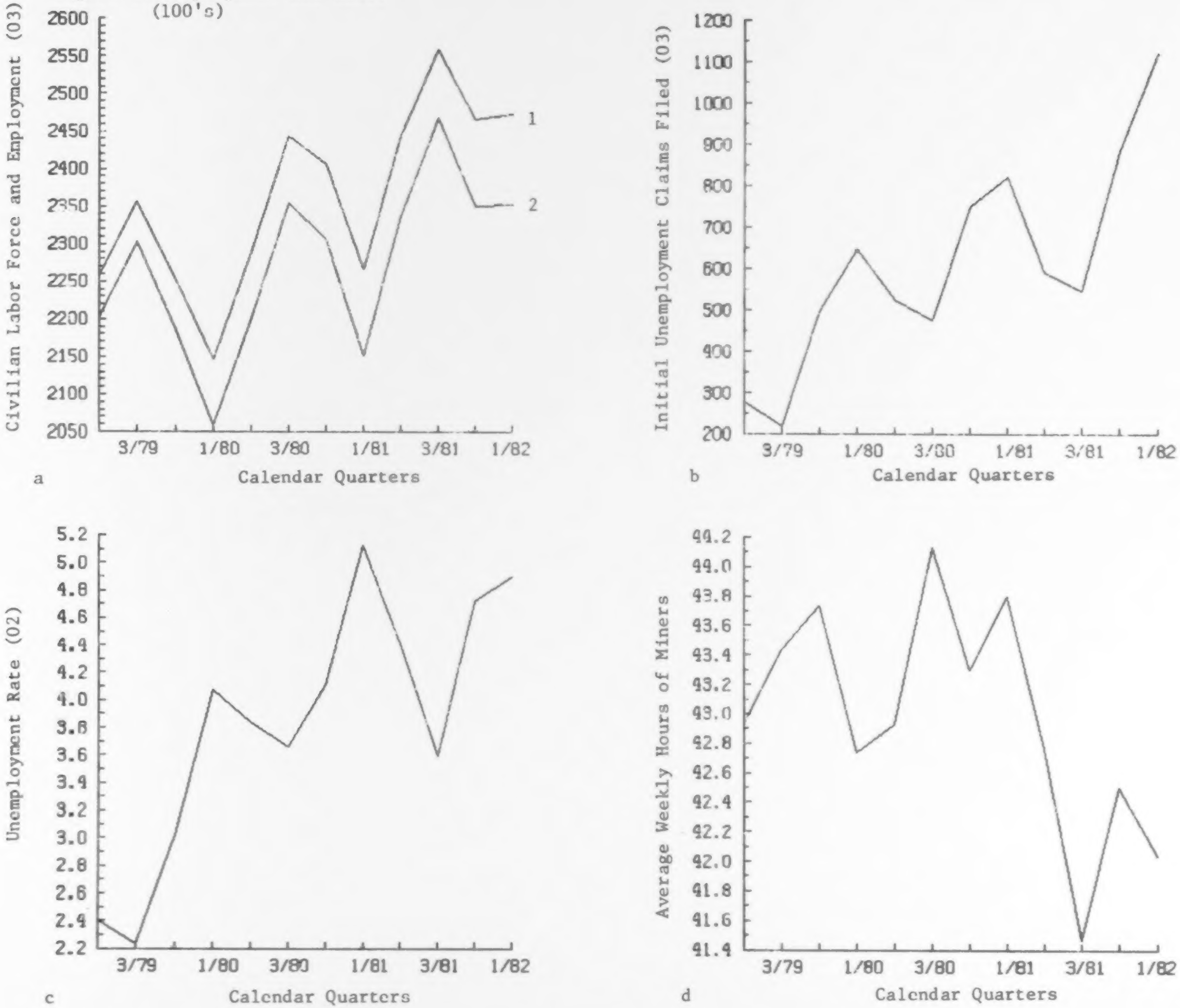

Table 4: Employment and Labor[1]

Calendar Quarters	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81	1/82
1. Civilian Labor Force (03)	225584.	235587.	225379.	214579.	228869.	244355.	240566.	226764.	244466.	255947.	246690.	247398.
2. Employment (03)	220174.	230334.	218571.	205831.	220080.	235404.	230685.	215148.	233690.	246745.	235036.	235277.
3. Unemployment (03)	5411.	5253.	6809.	8748.	8789.	8951.	9881.	11616.	10776.	9202.	11654.	12121.
4. Unemployment Rate (02)	2.4	2.2	3.0	4.1	3.8	3.5	4.1	5.1	4.4	3.6	4.7	4.9
5. Initial Claims Filed (03)	2790.	2200.	4977.	6466.	5242.	4745.	7494.	8231.	5901.	5463.	8837.	11237.
6. Applications Received (03)	11653.	10667.	8300.[2]	10263.	12481.	12727.	9584.	13026.	13522.	13884.	10000.[3]	12070.
7. New Non-Agricultural Openings (03)	12210.	13513.	9000.[2]	7126.	9217.	11068.	7526.	6912.	9903.	12991.	6300.[3]	6119.
8. New Non-Agricultural Placements (03)	10099.	10655.	8100.[2]	6211.	7848.	9218.	6482.	5649.	7681.	10072.	5850.[3]	5138.
9. Miner's Average Weekly Hours	42.9	43.3	43.7	42.7	42.9	44.1	43.3	43.8	42.8	41.5	42.5	42.0
10. Miner's Average Weekly Earnings (05)	390.12	395.23	413.16	424.77	425.31	438.77	429.26	448.66	453.75	447.13	459.64	476.53
11. Miner's Average Hourly Wage (05)	9.09	9.10	9.45	9.94	9.91	9.95	9.91	10.24	10.61	10.78	10.81	11.34

The data for 1982's first quarter indicate only slight changes in employment, the size of the labor force, and unemployment over 4/81.

Employment edged upward, with a total increase during the 4-month period of .10%. Based on past seasonal trends, we can anticipate a higher increase in the second quarter. At 235,277, total employment has increased by 9.36% over the first quarter of 1981.

Labor force growth has also been slow. The labor force of 247,398 represents a .29% increase over 4/81. According to projections made by the United States Department of Labor, the anticipated seasonal increase between a year's first and second quarter may be smaller than usual this year. The anticipated decline is reported to be due to a decrease in both the youth population and their rate of labor force participation.

A 4.0% (not percentage point) rise in unemployment and a 4.26% rise in the unemployment rates coincide with an increase in both the Civilian Labor Force and the overall number of persons employed by the state. First quarter unemployment claims are up 27.16% from the fourth quarter 1981. The number of openings decreased by 2.87% while applications increased 20.7% and job placements increased 12.17%.

Although changes have been slight, they have been for the better especially when compared with first (quarter) data in previous years. In the past, we have seen the civilian labor force decline by 4.79% and 5.74% between 4/79 and 1/80, and 4/80 and 1/81, respectively. Employment has also followed this trend, decreasing by 5.83% between 4/79 and 1/80, and decreasing by 6.74% between the fourth quarter of 80 and the first quarter of 81. Put together, these increases resulted in unemployment increasing 26.83% in 1/80 over 4/79, and increasing 19.61% in 1/81 over 4/80.

Despite the decline in hours worked, wages for miners were up in 1/82 over 1/81. This is due to a 10.74 percent increase in the hourly rate received in 1/82 over the rate paid in 1981.

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[1] The most recent year's data are preliminary.

[2] Estimated. October 1979 data are not available.

[3] Estimated. October and November 1981 data are not available.

Figure 5: Business Conditions

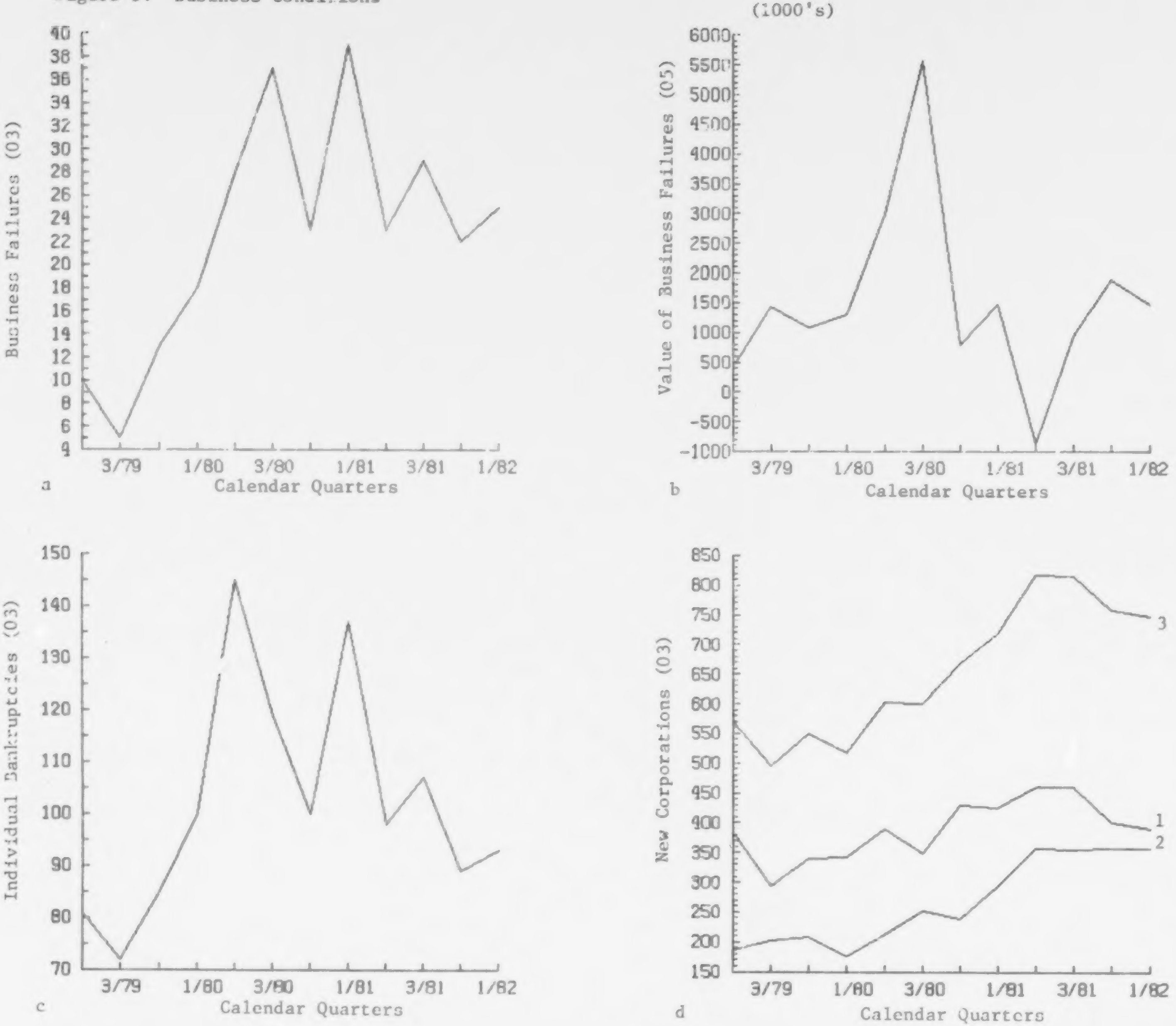

Table 5: Business Conditions

Calendar Quarters	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81	1/82
1. New Domestic Corporations (03)	383.	294.	340.	342.	391.	348.	429.	424.	459.	459.	400.	389.
2. New Foreign Corporations (03)	186.	201.	209.	175.	212.	252.	239.	294.	357.	356.	358.	357.
3. Total New Corporations (03)	569.	495.	549.	517.	603.	600.	668.	718.	816.	815.	758.	746.
4. Business Failures (03)	10.	5.	13.	18.	28.	37.	23.	39.	23.	29.	22.	25.
5. Value of Business Failures (05)	419868.	1429461.	1079393.	1307881.	2985150.	5565342.	799288.	1474498.	-858446.[1]	950251.	1891422.	1463952.
6. Personal Bankruptcies (03)	81.	72.	85.	100.	145.	119.	100.	137.	98.	107.	89.	93.

Business activity declined further in the first quarter. Decreased consumer spending (expected after the Christmas shopping season) and record-high real interest rates provided the necessary conditions for a 13.64% increase in business failures over 4/81. However, the dollar value of these failures reached only $1,463,952, indicating a 22.60% decrease from 4/81. Personal bankruptcies were up 4.49% over 4/81. To complete the economic picture for this quarter, the data shows a 1.58% decline in the number of new corporations registered.

Despite an overall decline below 4/81 figures in the business conditions indicators during this quarter, there has been an improvement over the last year. The number of business failures has decreased from 39 in 1/82 to 25 in 1/82, a 35.90% decrease below 1/81 failures. A decline in the number of business failures does not necessarily illustrate an improvement, however; the reason being that the value of business failures has not decreased at a comparable rate. In fact, there is only a .76% difference between the values for 1/81 and 1/82. A 32.12% decrease in the number of personal bankruptices in 1/82 over 1/81 does show positive change. The number of new corporations registered, increasing from 718 in 1/81 to 746 in 1/82, indicates an upswing in Wyoming's business conditions as well as an increased optimism in Wyoming's economy.

Business condition indicators should portray an even brighter picture in the months to come. With the Government giving the first installment of $39 billion in tax cuts and an $11.5 billion increase in Social Security benefits this July, economists are predicting a substantial improvement in the economy. In spite of the likely increase in spending, economists still view the outlook for lower inflation as very favorable.

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[1] Assets exceed liabilities

Figure 6: Construction

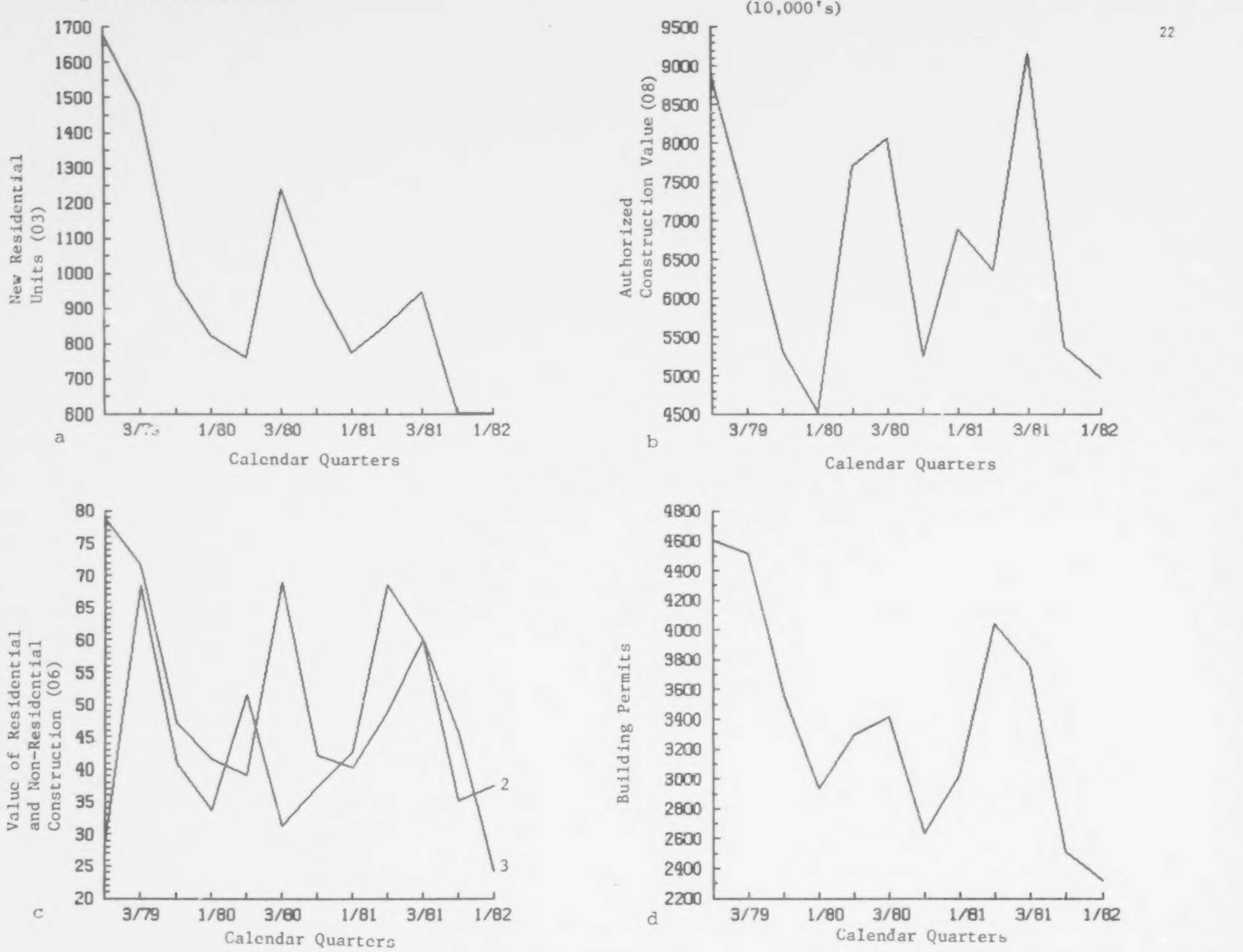

Table 6: Construction[1]

Calendar Quarters	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81	1/82
1. New Residential Dwelling Units (03)	1680.	1481.	976.	824.	762.	1240.	965.	777.	855.	948.	605.	604.
2. Value of Residential Dwellings Constructed	78.9	71.6	47.1	41.6	39.0	69.0	42.0	40.2	48.9	60.0	35.1	37.4
3. Value of Nonresidential Construction (06)	28.3	68.3	40.9	33.6	51.5	31.2	37.2	42.6	68.5	60.1	45.6	24.3
4. Building Permits Issued in Selected WY cities (03)	4604.	4515.	3560.	2934.	3293.	3414.	2637.	3027.	4040.	3755.	2516.	2317.
5. Value of Authorized Construction (08)	88798.	71643.	53215.	45371.	77045.	80648.	52550.	68995.	63557.	91789.	53839.	49768.

During the first quarter of 1982, 604 new residential dwelling units were built. This is about the same as the quarterly rate of 605 for 4/81, but 22.27% below the 1/81 rate of 777. A 6.97% decrease in the value of residential dwellings from 1/81 to 1/82 has occurred during the same time that the Department of Administration and Fiscal Control has reported a 9.37% increase in the annual rate of inflation for housing in the state of Wyoming. In a more optimistic light, the value of residential dwellings has shown a 6.15% increase over last quarter, showing more of an increase than the nation's consumer price index, which increased at an annual rate of 2.0% during 1/82.

Despite cutbacks, residential construction has been more successful than nonresidential construction within the last quarter. The value of nonresidential construction has declined 46.10% from 4/81. Figure 6 indicates the value of authorized construction, which has decreased a significant 43.95% since 2/79 (while the U.S. Consumer Price Index has risen 23.22%), and is 27.87% below the figure for 1/81. Similarly, there has been a 7.9% drop in the number of building permits issued, illustrating that the construction industry is still being plagued by high interest rates.

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[1] Numbers appearing in this table may differ slightly from source data due to summing of rounded data.

Figure 7: Utilities

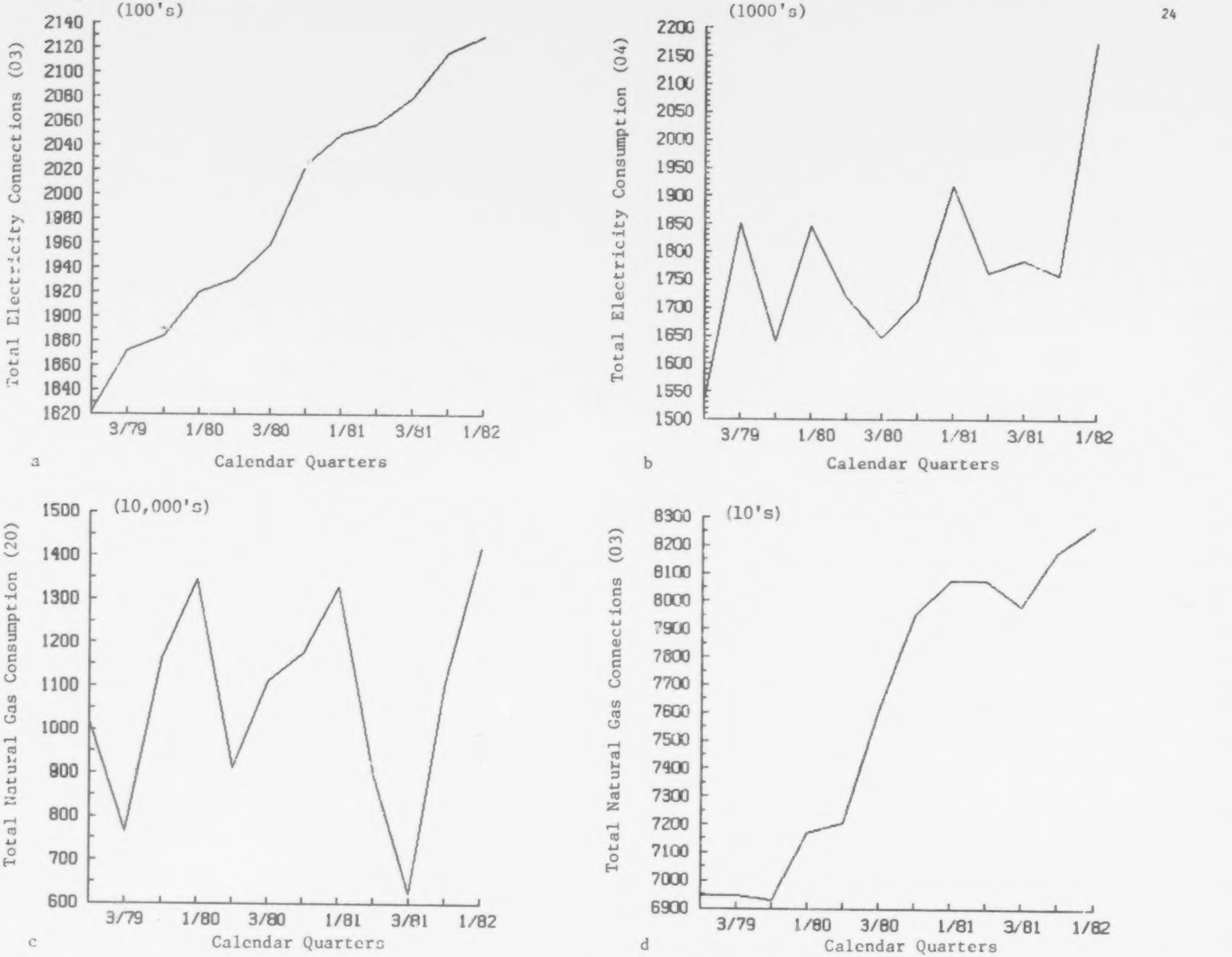

Table 7: Utilities[1]

Calendar Quarters	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81	1/82
1. Residential Electric Connections (03)	149212.	152198.	154682.	157183.	158424.	160950.	166342.	168477.	169494.	169777.	174369.	174018.
2. Residential Electric Consumption (04)	295537.	243384.	335770.	430258.	319866.	264960.	335159.	487386.	331256.	282226.	218361.	504636.
3. Commercial Electric Connnections (03)	26196.	26762.	27071.	27208.	27772.	28072.	28847.	29465.	29605.	30522.	30047.	30833.
4. Commercial Electric Consumption (04)	260014.	273717.	265711.	282677.	267804.	287954.	271561.	298580.	288617.	317998.	303091.	354594.
5. Industrial Electric Connections (03)	3283.	3352.	2891.	2891.	2957.	3057.	3312.	3377.	3384.	3484.	3590.	3581.
6. Industrial Electric Consumption (04)	939332.	1254562.	986892.	1092324.	1096646.	1013672.	1049382.	1100964.	1097628.	1112398.	1156967.	1266782.
7. Other[2] Connections (03)	3526.	4890.	3794.	4743.	3986.	3875.	3946.	3579.	3266.	4102.	3652.	4520.
8. Other Consumption (04)	38431	78105.	51980.	40623.	34114.	80540.	55639.	30333.	45006.	72994.	79409.	48237.
9. Residential Natural Gas Connections (03)	62765.	62977.	62977.	65346.	65731.	69297.	72468.	73699.	73712.	72966.	74828.	75677.
10. Residential Natural Gas Consumptions (20)	2323223.	851109.	2556825.	4236345.	2311300.	787701.	2770400.	3923502.	2180779.	814900.	2499236.	4607468.
11. Commercial Natural Gas Connections (03)	6396.	6161.	5997.	6095.	6026.	6360.	6561.	6595.	6557.	6385.	6393.	6482.
12. Commercial Natural Gas Consumption (20)	1101504.	367443.	1132437.	1872572.	976489.	347976.	1125956.	1766515.	970295.	382137.	943319.	1955899.
13. Industrial Natural Gas Connections (03)	100.	99.	87.	87.	97.	91.	93.	92.	94.	90.	89.	89.
14. Industrial Natural Gas Consumption (20)	6602746.	6322784.	7734080.	6428686.	5564123.	9887644.	7647357.	7345317.	5607535.	4959825.	7479593.	7328389.
15. Other Natural Gas Connections (03)	216.	222.	222.	189.	216.	342.	363.	348.	344.	349.	398.	400.
16. Other Natural Gas Consumption (20)	153280.	113356.	209720.	905798.	261674.	98459.	204268.	252249.	147575.	87695.	196349.	299920.
17. Business Telephone Connections (03)	137967.	139457.	142677.	144906.	145863.	147317.	149949.	152263.	152669.	154234.	47828.	48501.
18. Private Telephone Connections (03)	46337.	47448.	47748.	49252.	50367.	50876.	51043.	52272.	52193.	55379.	163100.	163790.
19. Total Telephone Connections (03)	184304.	186905.	190625.	194158.	196230.	198193.	200992.	204535.	204862.	209613.	210928.	212291

Total telephone connections continue to increase at a steady rate in 1/82 for the 12th consecutive quarter, with an average increase of 1.30%. This increase has occurred despite a marked decline in business telephone connections since 3/81.

Residential electric connections have decreased, while 1/82 residential electric consumption shows its usual increase over the fourth quarter of the previous year. Although seasonal variability of electricity consumption is not as pronounced as gas, we do note a 56.73% increase over 4/81. The same trend exists for industrial electric consumption where a .25% decrease in industrial electric connections is paired with an increase of 8.67% in industrial consumption.

A 45.75% increase in this first quarter of 82 in residential gas consumption over 4/81, when compared with a 29.39% increase in 1/81 over 4/80, shows that Wyoming experienced closer to "normal" winter temperatures than last year.

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[1] Some small utilities do not report, hence the data are slightly less than actual state totals. Data are consistent. The same utilities' reports are included in each figure

[2] Other includes Agriculture, Municipal, and Other public

Figure 8: Consumers

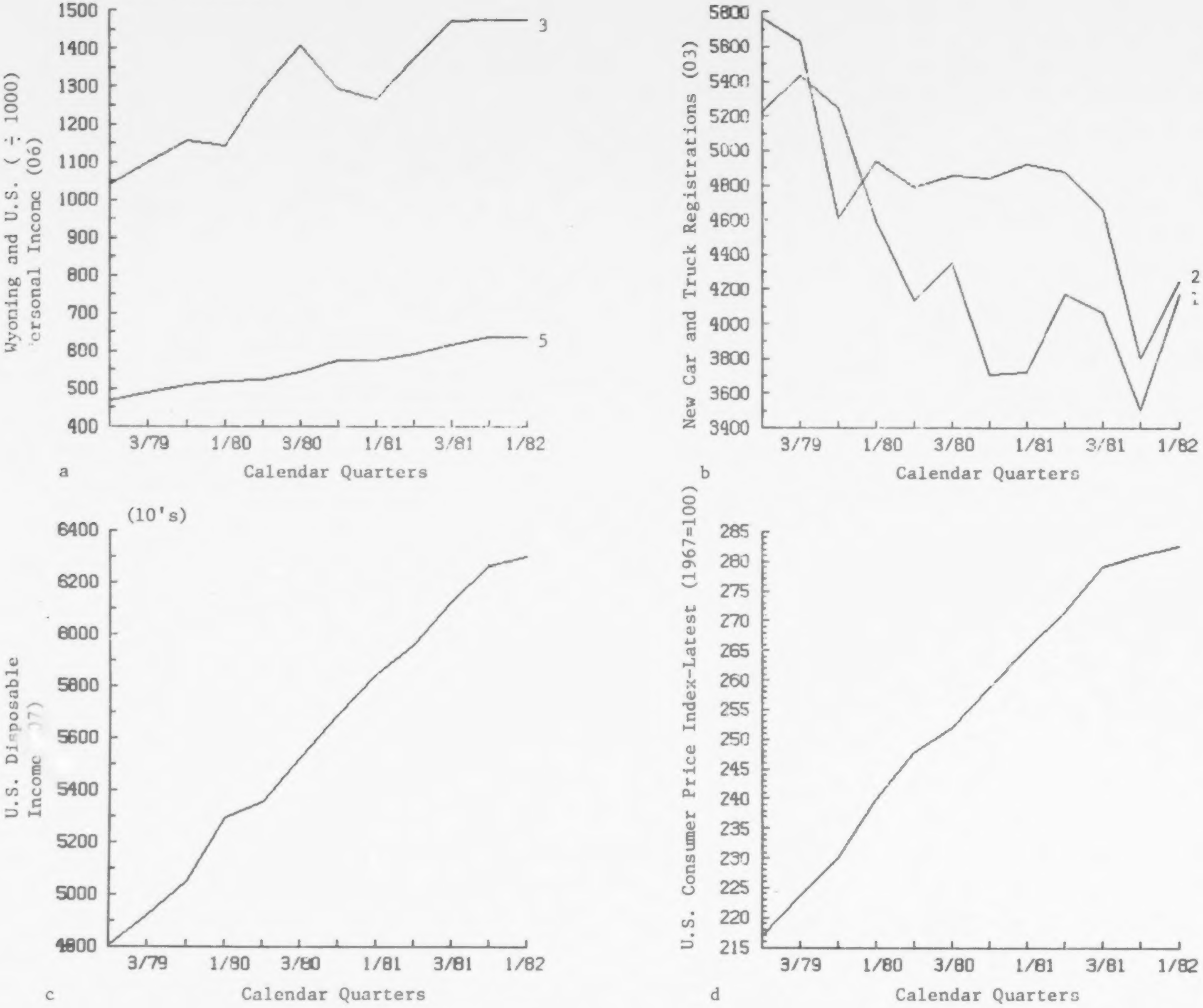

Table 8: Consumers

Calendar Quarters	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81	1/82
1. New Truck Registrations (03)	5223.	5435.	5248.	4593.	4134.	4353.	3706.	3723.	4175.	4067.	3502.	4176.
2. New Car Registrations (03)	5765.	5628.	4608.	4937.	4787.	4859.	4839.	4926.	4879.	4664.	3808.	4249.
3. Wyoming Personal Income (06)	1040.	1098.	1158.[2]	1143.	1296.	1409.	1296.	1278.	1375.	1474.	1476.	1461.[5]
4. U.S. Disposable[3] Income (07)	1602.	1640.	1683.	1765.	1784.	1841.	1897.	1948.	1986.	2042.	2088.	2111.[1]
5. U.S. Personal Income (06)	470299.	488614.	510219.[2]	521332.	524735.	543122.	575096.	576872.	594251.	615399.	637178.	630000.[5]
6. Latest U.S. Consumer[4] Price Index (1967=100)	216.9	223.7	230.0	239.9	247.8	251.9	258.7	265.2	271.4	279.1	281.1	282.5
7. Quarter's Average US CPI	214.3	221.5	227.7	236.6	245.2	249.3	256.4	263.1	269.1	276.7	280.4	281.9
8. Liquor Sales (08)	7224.	6956.	9586.	6410.	7696.	8951.	11280.	6856.	9397.	9396.	11365.	7787.

The increase in new car and truck registrations from 4/81 to 1/82 may either be due to improving economic conditions or just a temporary rise prompted by rebate offers and improved warranties. In either event, the 4/81 to 1/82 19.2% and 11.5% increase in new truck and car registrations, respectively is definitely not due to a predictable, seasonal upswing in sales.

Estimated disposable and personal income data for 1/82 are not significantly different from the same data for 4/81. However, the 14.3% increase in Wyoming's total personal income from 1/81 to 1/82 is 7.5 percentage points greater than the rate of inflation prevailing in Wyoming during that 12-month period. In other words, Wyoming's total personal income grew more than twice as fast as inflation.

Beginning in 3/81, the rate of increase in the nation's consumer price index has slowed markedly (Figure 8d). From September, 1982 to March, 1982 the nation's annual rate of inflation has averaged 2.4%. For all of 1980, the rate was 12.5%. Hopefully, this cooling in the fires of inflation can be maintained when recession yields to recovery; a recovery which may even now be underway.

Liquor sales had their customary post holiday season plunge. From 4/80 to 1/81 liquor sales declined 39.3%, and from 4/81 to 1/82 liquor sales dropped 31.5%. However, liquor sales in 1/82 were 13.8% higher than in 1/81.

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[1] Preliminary. An estimate based on trend and first 2 months of the quarter.
[2] Estimated. Nov. 1979 data are missing.
[3] Seasonally adjusted at annual rates.
[4] Number shown is for the last month of the quarter.
[5] Based on trend and first two months of the quarter.

Consumers

Wyoming Comparative Cost of Living Index* (April 7-9, 1982): Cheyenne = 100

City	Rank	All Items	Food	Housing	Transportation	Medical
Jackson	1	132.92	100.67	173.31	101.29	105.31
Casper	2	113.25	104.71	123.65	107.53	111.10
Rock Springs	3	110.46	102.06	119.55	103.60	100.28
Riverton	4	110.36	103.05	119.51	105.38	103.37
Kemmerer	5	110.22	94.01	122.56	102.79	98.07
Gillette	6	110.20	107.17	116.66	104.86	109.33
Evanston	7	109.88	100.10	117.87	103.24	105.21
Sheridan	8	107.79	102.10	114.19	101.17	104.07
Sundance	9	107.23	103.32	114.26	100.12	101.27
Douglas	10	106.63	100.83	108.96	104.08	112.95
Thermopolis	11	106.59	103.99	110.84	103.04	99.66
Newcastle	12	104.22	101.80	109.86	96.07	104.74
Wheatland	13	103.20	105.92	102.20	102.72	97.67
Rawlins	14	102.81	100.86	107.30	101.77	93.77
Worland	15	102.50	101.09	103.45	100.61	104.37
Laramie	16	101.68	97.84	105.34	98.11	95.27
Cody	17	101.68	102.86	101.17	100.53	103.78
Pinedale	18	101.18	99.38	99.42	102.50	102.41
Cheyenne	19	100.00	100.00	100.00	100.00	100.00
Buffalo	20	99.72	104.06	95.55	98.55	106.24
Greybull	21	97.81	102.20	91.75	100.63	99.37
Torrington	22	92.07	92.05	85.44	97.10	103.77
Lusk	23	88.30	97.27	72.96	99.60	101.66

Wyoming Comparative Cost of Living Index* (January 6-8, 1982): Cheyenne = 100

City	Rank	All Items	Food	Housing	Transportation	Medical
Jackson	1	125.84	101.57	157.57	98.49	107.87
Evanston	2	113.00	105.12	124.22	101.31	105.99
Riverton	3	112.60	107.59	124.51	100.13	104.95
Casper	4	111.63	104.82	120.93	105.44	111.30
Kemmerer	5	111.57	100.95	123.94	99.30	101.88
Rock Springs	6	110.37	104.07	113.80	102.81	100.44
Sheridan	7	109.59	104.06	117.23	100.00	105.93
Gillette	8	107.60	106.37	113.37	102.56	108.19
Pinedale	9	107.48	104.07	119.34	100.53	102.62
Sundance	10	106.85	107.18	112.75	100.08	100.56
Douglas	11	106.39	108.21	107.26	101.14	114.20
Laramie	12	105.78	98.98	113.84	97.75	94.57
Thermopolis	13	105.14	108.92	105.80	98.71	99.74
Cody	14	104.45	106.37	108.38	98.00	103.04
Rawlins	15	101.28	102.22	103.84	100.99	93.71
Wheatland	16	100.65	110.14	96.10	101.55	97.92
Cheyenne	17	100.00	100.00	100.00	100.00	100.00
Buffalo	18	98.15	108.02	91.97	98.86	95.01
Newcastle	19	96.00	101.78	91.48	96.24	106.05
Worland	20	95.07	101.94	86.79	98.11	104.78
Torrington	21	93.28	97.72	86.94	96.23	101.44
Greybull	22	92.74	103.24	81.21	98.71	100.00
Lusk	23	89.49	98.89	76.08	96.79	103.41

Source: Wyoming Department of Administrative and Fiscal Control
*Apparel and Recreation Indices not shown.

Table 9: Banking and Finance

Calendar Quarters	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81	1/82
1. Total Bank Loans (08)	1618031.	1667332.	1661606.	1677881.	1689496.	1722916.	1764381.	1808747.	1898325.	1929706.	1984965.	2044233.
2. Total Bank Deposits (08)	2439970.	2510176.	2734107.	2651863.	2755238.	2826427.	3034647.	2968348.	3112270.	3161593.	3278504.	3237333.
3. Total Bank Demand Deposits (08)	706104.	748983.	865452.	746467.	796838.	839111.	878444.	736161.	737837.	759658.	731429.	657349.
4. Bankers' Loan-Deposit Ratio	.66	.66	.61	.63	.61	.61	.58	.61	.61	.61	.61	.63
5. Savings and Loan[1] Mortgage Loans (08)	648725.	687735.	706103.	711387.	719627.	741479.	770474.	776172.	788526.	785208.	778334.	762153.
6. Savings and Loan[1] Deposits (08)	666293.	689301.	724538.	749815.	770186.	788448.	842740.	874533.	891585.	911587.	904212.	921642.

Interest rates, which fell near the end of last year but rose and maintained through 1/82 did not seem to affect a change in the rate growth of total bank loans. With borrowers in need of funds to finance recession-battered pocketbooks, total bank loans rose 2.99% over 4/81 during 1/82. A steady increase in the number ot total bank loans during the period from 1/81 to 1/82 resulted in a 13.02% increase in total loans in 1/82 over 1/81 twice the state's inflation rate during that period.

While the banks' liabilities increased, the total number of bank deposits exhibited its cyclical first-quarter decline. The 1.26% drop in 1/82 below 4.81 was caused by a $74,080 decrease in total bank demand deposits during the same period. At the same time, however, time deposits have increased from $2,547,075 in 4/81 to $2,579,984 in 1/82.

Savings and loan associations have not experienced the same trends. The level of savings and loan mortgage loans has decreased again during this quarter falling 2.08% below 4/81 and 1.81% below the 1/81 figure. Although the rate of decrease in the dollar amount of mortgage loans is only slightly significant, the downward trend evident since 3/81 shows that inflated housing costs (increasing 9.37% from 1/81 to 1/82) and high interest rates have deterred borrowers. Unsure of the economy, the public is placing more of its earnings into savings. The fact that passbook savings account interest rates are again higher than the rate of inflation is certainly a major factor as well. Savings and loan associations show a 1.93% increase in deposits over 4/81 and a 5.39% increase in deposits over 1/81.

Looking to the future, with an expected surge in disposable incomes expected in July following tax cuts and increased social security benefits, banks will have more money work with, hopefully pushing down the interest rates.

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[1] Only members of the Federal Home Loan Bank Board are included.

Figure 10: Government

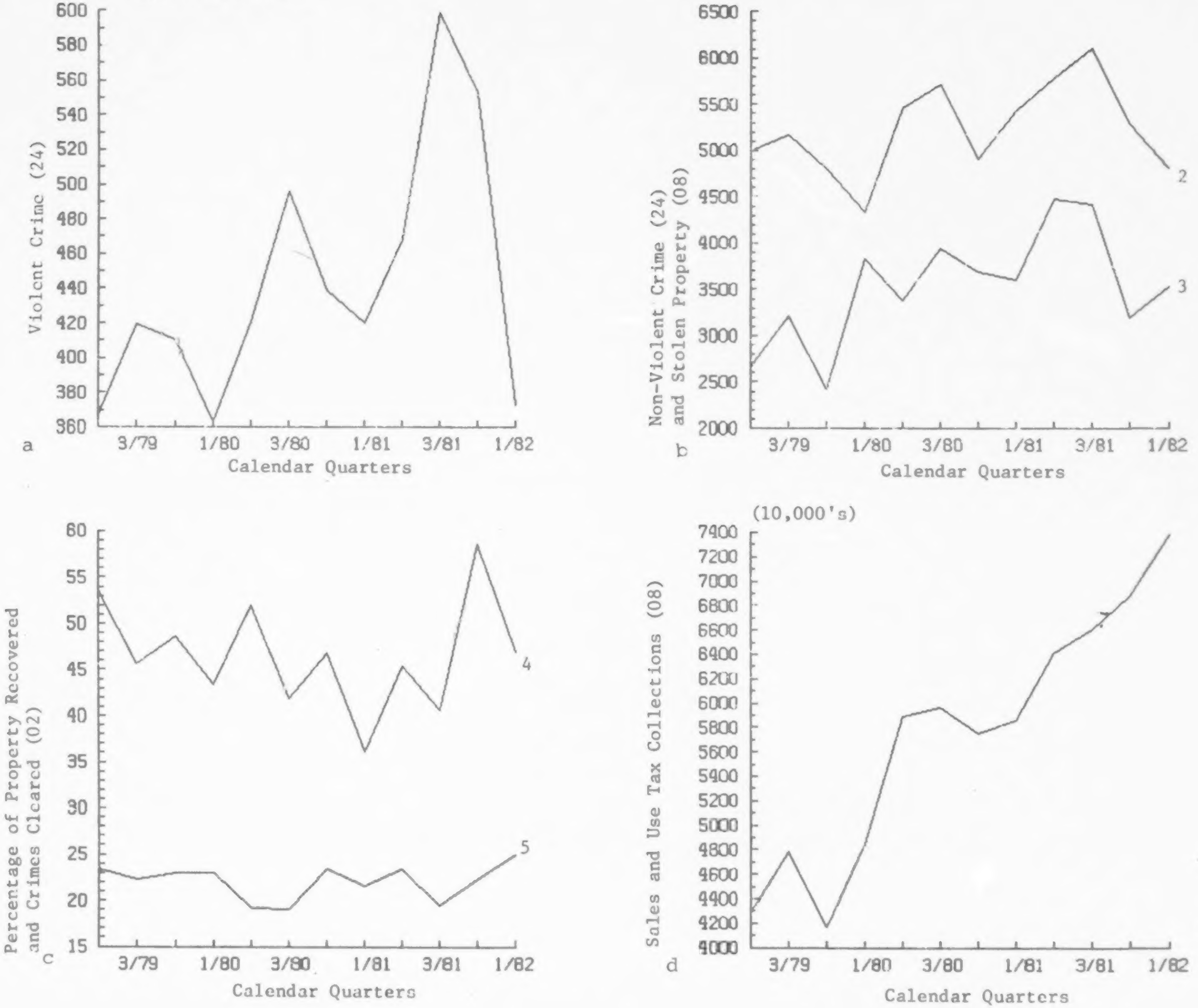

Table 10: Government

Calendar Quarters	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81	1/82
Criminal Justice Statistics												
1. Violent Crime[1] (24)	367.	419.	410.	363.	421.	496.	439.	420.	468.	599.	553.	373.
2. Non-Violent Crime[2] (24)	5003.	5172.	4803.	4331.	5464.	5710.	4916.	5430.	5783.	6111.	5299.	4811.
3. Stolen Property (08)	2666.	3207.	2421.	3837.	3374.	3945.	3696.	3601.	4471.	4421.	3201.	3541.
4. Stolen Property Recovery Rate (02)	53.5	45.6	48.6	43.4	51.9	41.9	46.8	36.0	45.4	40.6	58.6	46.9
5. Percent of Crimes[3] Cleared (02)	23.4	22.3	23.0	23.0	19.1	19.0	23.4	21.6	23.4	19.5	22.3	24.9
Tax Revenues												
6. Sales and Use Tax Collections (08)	42787.	47815.	41630.	48511.	58928.	59626.	57547.	58605.	64136.	66012.	68766.	73830.

Although the Uniform Crime Reporting Center for Criminal Justice Research reports an increase in murder and robbery for 1/82, there has collectively been a 32.55% decrease in reported violent crimes from 4/81. The current seasonal decline is even more pronounced than the usual change from third to first quarter, such as is evident from the 3/79 to 1/80 and 3/80 to 1/81 decreases in violent crime. For example, from 3/80 to 1/81 Wyoming experienced a 15.32% drop in violent offenses, and from 3/81 to 1/82, there was a 37.73% drop in violent offenses. Non-violent (or property) crimes, the bulk of reported crimes, tend to follow the same seasonal trend. The number of offenses in this category decreased 21.27% from 3/81 to 1/82, and decreased 9.21% from 4/81 to 1/82.

A total of 5,184 offenses were recorded during the first quarter of 1982 compared to 5,816 offenses in the first quarter of 1981. The clearance rate for 1/82 is 46.9%, or a total of 1,289 recorded clearances compared to 1,285 clearances in 1/81.

The total dollar amount of stolen property is slightly above the average amount over the last 12 quarters (total stolen property, 1/82: 3541; average total stolen property, 2/79-1/82: 3,531.75) and is 10.62% over 4/81. In part due to the increase in the dollar amount of property stolen, there has been a 19.97% (not percentage point) decrease in the stolen property recovery rate.

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[1] Murder, negligent homicide, forcible rape, robbery, aggravated assault

[2] Burglary, larceny, auto theft

[3] Clearance of a crime indicates resolution of a complaint by arrest or other extraordinary means

Figure 10: Transportation

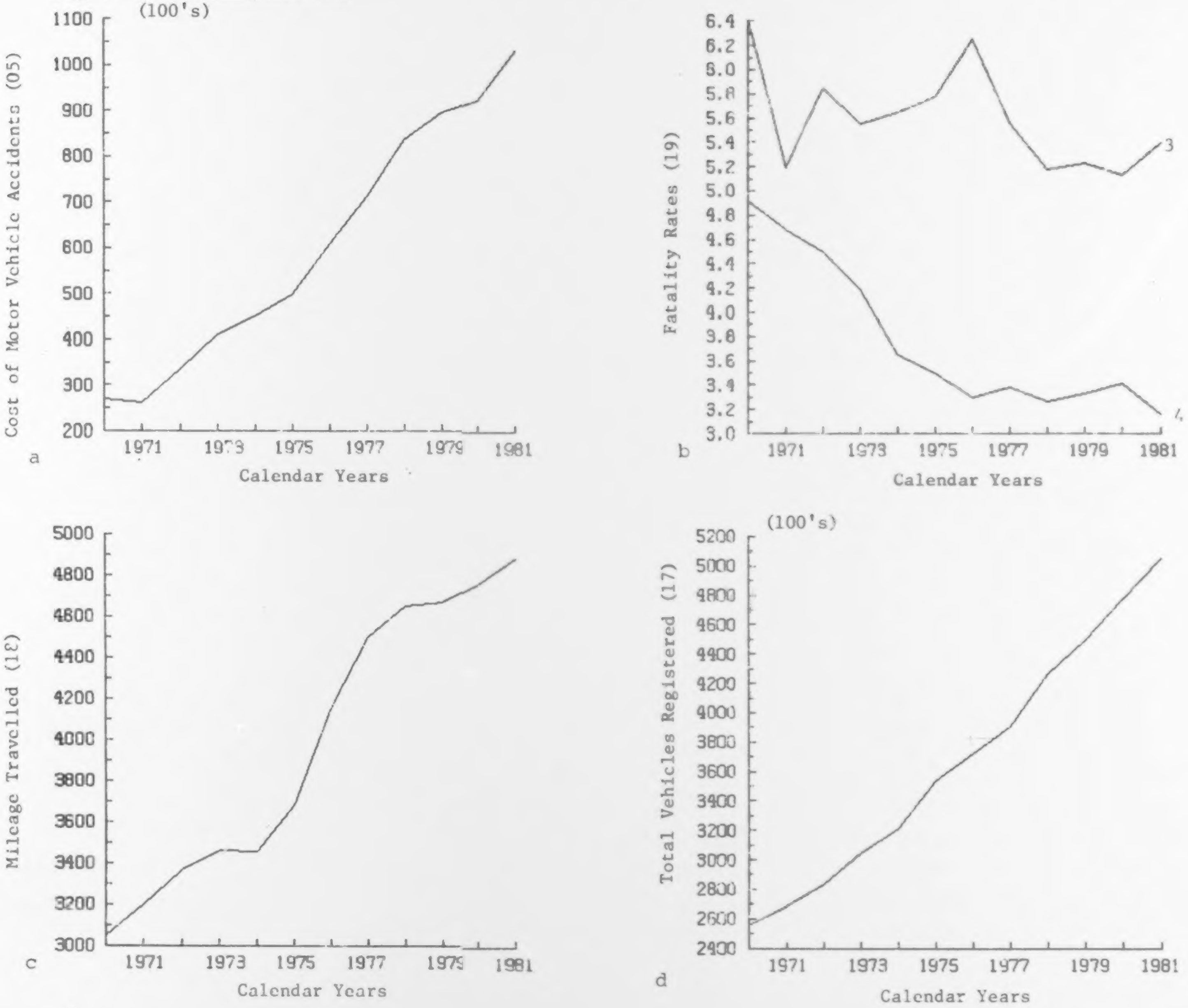

Table 11: Transportation

Calendar Years	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
1. Cost of Motor (08) Vehicle Accidents	27105.	26261.	33617.	41119.	45166.	49862.	60746.	71169.	83571.	89683.	92458.	103363.
2. Traffic Deaths (03)	194.	166.	197.	192.	195.	213.	260.	250.	241.	244.	245.	264.
3. Wyoming Traffic (19) Fatality Rate	6.40	5.19	5.85	5.55	5.65	5.78	6.25	5.56	5.18	5.23	5.14	5.40
4. US Traffic Fatality Rate (19)	4.91	4.68	4.50	4.19	3.65	3.50	3.30	3.38	3.27	3.33	3.41	3.16
5. Mileage Travelled (18)	3045.	3198.	3369.	3459.	3453.	3682.	4157.	4500.	4649.[2]	4669.	4763.	4885.
6. Total Vehicles (17) Registered	255282.	268274.	283841.	304749.	320799.	353102.	I.N.A.	390236.	425949.	449408.	477352.	505206.
7. Total Rail (12) Originating Freight	12583.	13458.	15696.	19311.	25039.	27455.	32585.	44738.	59000.	70171.	93597.	101888.
8. Rail Coal Shipments (12)[1]	3764.	4693.	6500.	8987.	14297.	16931.	21214.	32601.	46220.	56954.	80629.	89120.
9. Rail Stone, Clay and Glass Products (03)[1]	2104.	2120.	2183.	2530.	2626.	2440.	2366.	2164.	2549.	2568.	2263.	2477.
10. Rail Chemical and Allied Products (12)[1]	2570.	2740.	2993.	3502.	3892.	4141.	4954.	6004.	6539.	6843.	6832.	6613.

Calendar Quarters	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81	1/82
11. % of Motorists Exceeding 55 m.p.h.	72.1	71.0	63.1	55.1	62.5	53.2	49.1	48.7	42.9	49.9	62.1	63.6
12. % Exceeding 60 m.p.h.	24.1	28.5	30.6	18.3	27.9	21.5	20.7	15.3	16.6	18.3	34.6	34.0
13. % Exceeding 65 m.p.h.	9.0	11.7	9.7	4.7	8.0	6.3	5.6	3.9	4.1	5.1	15.4	14.1

The cost of motor vehicle accidents was 11.8% higher in 1981 than in 1980. However, in light of a 6.11% inflation rate prevailing in Wyoming for 1981, and a 5.8% increase in the number of registered vehicles, the real cost per vehicle appears to be no higher in 1981 than 1980. Until May of 1982, gasoline prices were dropping in absolute as well as real terms (adjusted for inflation), and had been doing so for some time. The apparent increase in Wyoming's fatality rate, and the substantial increase in percent of motorists exceeding the speed limit appears to be strongly correlated with the decline in fuel prices. However, mileage traveled increased in 1981 over 1980 by only 2.6%, less the increase in vehicle registrations. The increase in all three categories of speeders is especially startling in light of the fact that the largest increase took place from 3/81 to 4/81, just when weather conditions usually depress driving speeds. The increase from 3/81 to 4/81 held into 1/82.

Total rail freight originating in Wyoming continued to increase. However, the percentage rate of growth from 1980 to 1981 (8.4%) was down substantially from the growth from 1979 to 1980 (33.9%). Coal shipments continued to increase their share of total shipments during 1981. In fact, the absolute growth in coal shipments was 200,000 short tons greater than the growth in total shipments. Revenue ridership (next page) originating at Wyoming's Amtrak stations appears to be growing at most stations throughout the 1976-81 reporting period. The growth appears to be especially rapid in the last three years.

The data for air travel to and from Wyoming's major airports shows no definite trend. The lack of strong growth trends to match the state's population growth is not suprising in light of the frequent reports of terminated or reduced air service at some of the state's airports.

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[1] Shipments Originating in Wyoming.

[2] Estimated by State Highway Department.

Table 11b: Total Arriving and Departing Passengers at Wyoming Airports

Calendar Quarters	1/80	2/80	3/80	4/80	1/81	2/81	3/81
Cheyenne, WY	14050	14700	14770	13050	10380	11620	10790
Laramie, WY	8080	7250	7100	7690	6480	6090	6960
Rawlins, WY	480	530	40	0	3290	0	0
Rock Springs, WY	10790	9370	11690	10210	9100	10410	9810
Riverton/Lander, WY	9320	9420	8710	8710	7050	8610	7800
Jackson, WY	13410	15270	32420	10230	9360	15040	27560
Lovell/Powell/Cody, WY	4270	5550	6320	5180	3290	5040	6310
Worland, WY	2690	2750	3400	2510	2110	2860	3070
Sheridan, WY	7300	4850	4510	2770	2090	3100	3820
Gillette, WY	2040	2910	2190	2290	2280	2320	3320
Casper, WY	56000	58610	64040	63110	55390	61600	54740

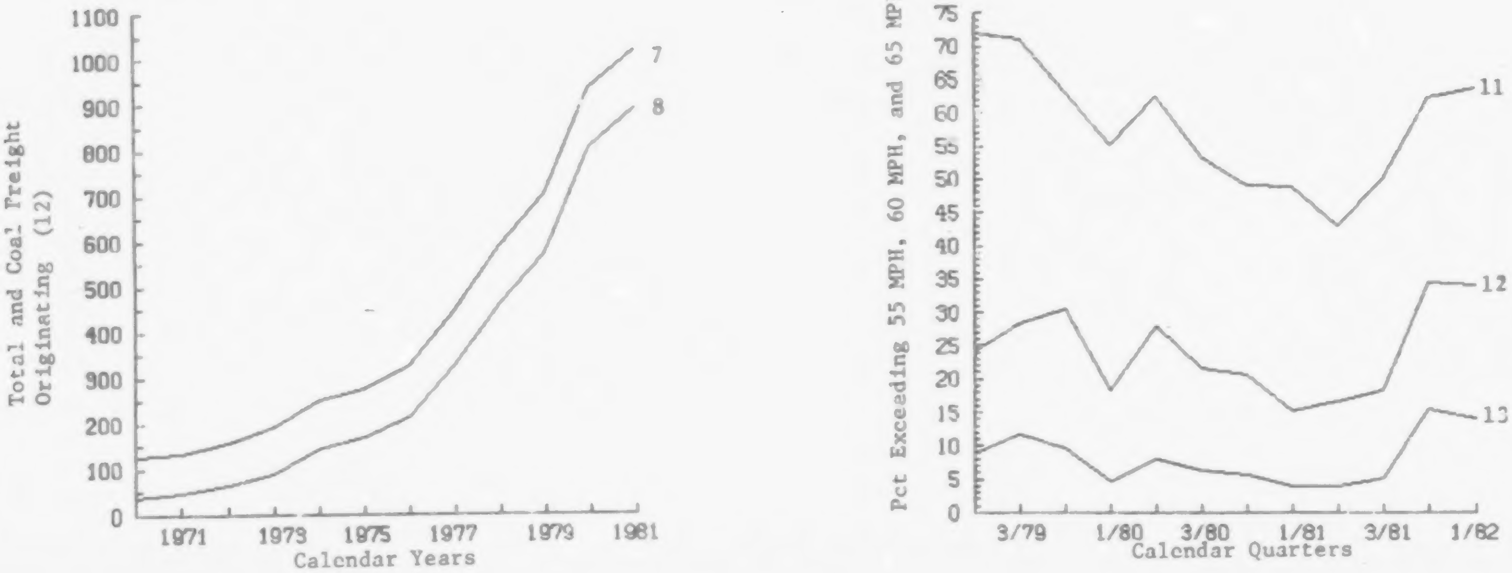
Source: 10% Sample Survey by the Civil Aeronautics Board

Table 11c: Revenue Ridership at Amtrak Stations in Wyoming

Federal Fiscal Years	1976	1977	1978	1979	1980	1981
Evanston	1420	1383	1403	1474	2170	3279
Green River	3356	2756	3355	3198	4493	4962
Rock Springs	5941	5062	5943	7183	8063	10516
Rawlins	5288	4953	5069	6466	8969	9929
Laramie	5147	5058	5704	6799	8425	8604
Cheyenne	12137	10533	11376	12136	13174	14951

Source: Amtrak Corporation Communications

Figure 10:



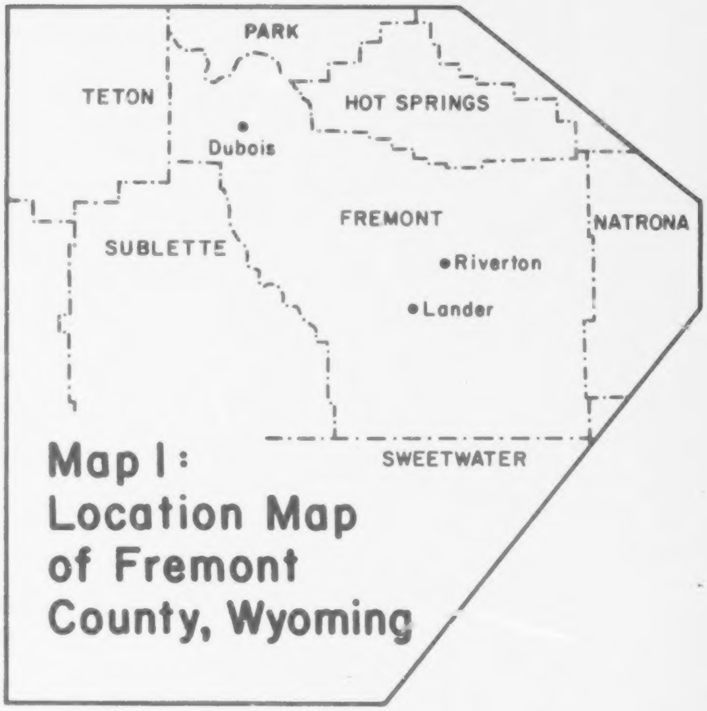
Fremont County Profile

by John Merrifield and Ruth Tebbutt

PHYSICAL CHARACTERISTICS AND CLIMATE

Fremont County is located in west central Wyoming (Map 1), with the Continental Divide traced along the summits of the Wind River Range coinciding with its western boundary. The "Winds," as these magnificient peaks are often referred to locally, include several summits with elevations in excess of 13,000 feet. Among these mountains is Gannett Peak, which at 13,804 feet bests the Grand Teton by 34 feet as the state's highest point. Rugged terrain also characterizes Fremont County's other boundaries. It is flanked to the northwest by the Absaroka Range, to the north by the Owl Creek Mountains, to the south by the Green Mountains and the Antelope Hills, and to the east by the Rattlesnake Hills. Despite the numerous mountain ranges and a difference of 9,000 feet between the highest and lowest elevations in the county, Fremont County's north central area includes a substantial amount of relatively flat land.

No general statement can be made to apply to the climate of Fremont County. Recording stations are not maintained high in the mountains, but even at lower elevations (Lander, 5,563 feet and Riverton 4,954 feet) differences in precipitation and wind speed are significant. Lander and Riverton have similar temperatures, with July means just over 70°F and January means in the teens. However, despite being separated by a distance of only 24 miles, Lander's mean annual precipitation (14.18 inches) is 59.3 percent higher than Riverton's (8.90 inches). Most precipitation comes in the form of winter snowfall, with Lander's 103.6 inches average annual snowfall ranking among the highest of Wyoming's recording stations. Lander's average wind speed of seven miles per hour is among the lowest in the nation.



Map I: Location Map of Fremont County, Wyoming

HISTORY

The first humans known to occupy Fremont County were various American Indians. The Crow nation occupied the area until at least 1854, and the Arapahoe, Bannock, and Shoshone tribes have been residents since then. The first white explorers to enter the area were members of the Lewis and Clark Expedition in 1806. Between 1806 and 1846 when the county's namesake General Charles H. Fremont arrived to explore the area, numerous hunters and trappers, including Jim Bridger and Kit Carson, used the area. In addition to naming one of the higher peaks of the "Winds" after himself, Fremont conducted extensive mapping and surveying activities, and in so doing made the area known to the rest of the nation.

The first permanent settlers arrived in 1868, and others followed when significant amounts of gold were discovered in the South Pass area. The excitement surrounding the search for gold led to the formation of Fremont County's first two cities: South Pass City and Atlantic City, only a few miles apart. While the prospect of instant mineral riches brought most of the earliest settlers, livestock grazing proved to be a more viable long-term economic enterprise. South Pass was also important as a passage over the Continental Divide. The fact that South Pass was the only segment of the Oregon Trail whose maintenance was subsidized by the government is indicative of its importance in the settlement of the West.

Table 12: Fremont County Profile

Calendar Years	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
1. Births (03)	611	563	538	542	530	543	651	763	777	897	1000	INA
2. Deaths (03)	221	214	221	246	231	262	249	232	214	274	296	INA
3. Divorces (03)	146	132	160	146	192	220	243	248	233	275	311	INA
4. Marriages (03)	300	327	373	349	353	359	420	440	463	528	505	INA
5. Oil Production (26)	93046	INA	91126	81533	72829	68041	60890	59010	60572	62298	64435	60000[2]
6. Valuation of Oil Production (10)	262225	INA	275239	282836	370821	359953	343733	358389	440910	630443	1124869	INA
7. Natural Gas Production (20)	444473	INA	449196	449056	477960	386300	436289	529541	461367	539837	504454	540000[2]
8. Valuation of Natural Gas Production (10)	73440	INA	81590	90679	111198	111977	230811	527364	472161	787371	743094	INA
9. Uranium Production (11)	1136715	937536	994997	807233	649306	1167964	1508470	1844965	1935281	1886906	2048536	1700000[2]
Fiscal Years	**1970**	**1971**	**1972**	**1973**	**1974**	**1975**	**1976**	**1977**	**1978**	**1979**	**1980**	**1981**
10. AFDC Recipients (03)	INA	INA	2181	2490	3320	3695	3187	2901	[illegible]061	2629	2795	2440
11. Food Stamp Recipients (03)	INA	453	723	754	833	1510	1070	916	[illegible]	759	1062	1103
12. AFDC Payments (05)	INA	INA	277506	340937	470370	514140	488340	497643	52[illegible]	520124	633331	549648
Calendar Quarters	**2/79**	**3/79**	**4/79**	**1/80**	**2/80**	**3/80**	**4/80**	**1/81**	**2/81**	**3/81**	**4/81**	**1/82**
13. Hotel, Motel & Camp Sales & Use Tax (05)	29409	49806	25554	27345	40958	61020	35032	33636	40939	61771	47824	35577
14. Net Collections, Sales & Use Tax (05)	1670873	1708367	2142204	2624777	3140133	2991365	2796499	2711119	2751971	2831968	2924468	3094423
15. Liquor Sales (05)	526460	512704	740230	501806	569757	642336	829534	515459	567056	637633	801808	INA
16. Gasoline Gallonage (22)	9334534	9311989	7626672	6857201	7208714	8580559	4096547	5245110	6493271	7324588	5909882	5000000[1]
Calendar Years	**1970**	**1971**	**1972**	**1973**	**1974**	**1975**	**1976**	**1977**	**1978**	**1979**	**1980**	**1981**
17. Population* (03)	28352	28700	30000	30000	30700	31200	32100	33600	35700	37900	38992	INA
Fiscal Years	**1970**	**1971**	**1972**	**1973**	**1974**	**1975**	**1976**	**1977**	**1978**	**1979**	**1980**	**1981**
18. State Board of Equalization Valuations (05)	56943088	62371906	61791381	67446144	67341091	80440912	84287532	109882384	151856368	148325685	195901476	251832946
19. Locally Assessed Property Valuations (05)	51157769	52108599	54431861	54692825	57769252	56412839	60998982	65432438	68312801	81778341	91247203	98027349
20. Cigarette Tax Dist. (05)	152572	165738	172767	191756	185217	200420	181418	214245	234670	254287	253878	256637

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*1971 through 1979 are estimates made by the Bureau of Economic Analysis, not actual counts as in 1970 and 1980.

[1] Estimate based on January and February data and trend.

[2] Projections by DEPAD.

Figure 11a: Fremont County On-Line Data Base

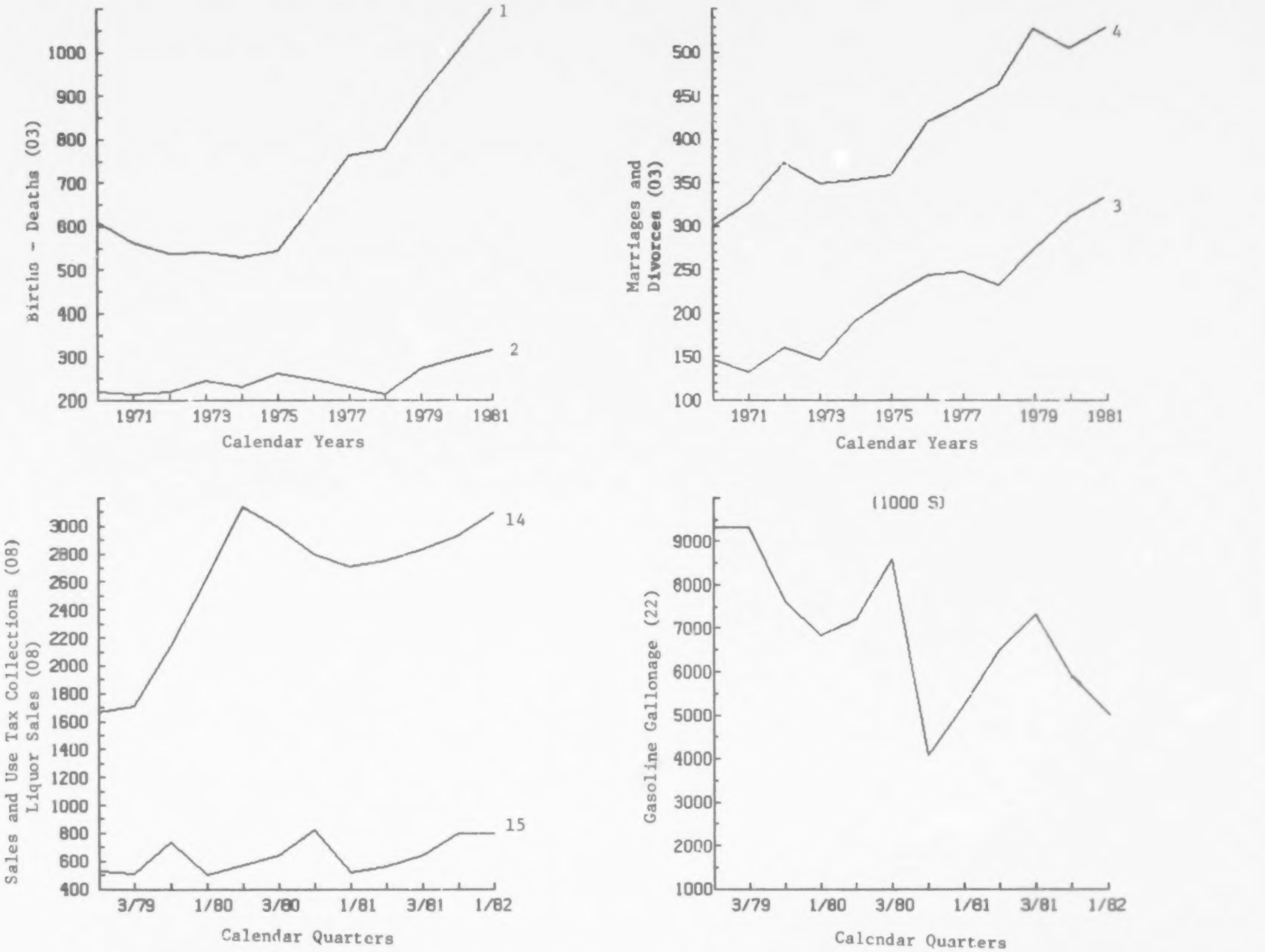
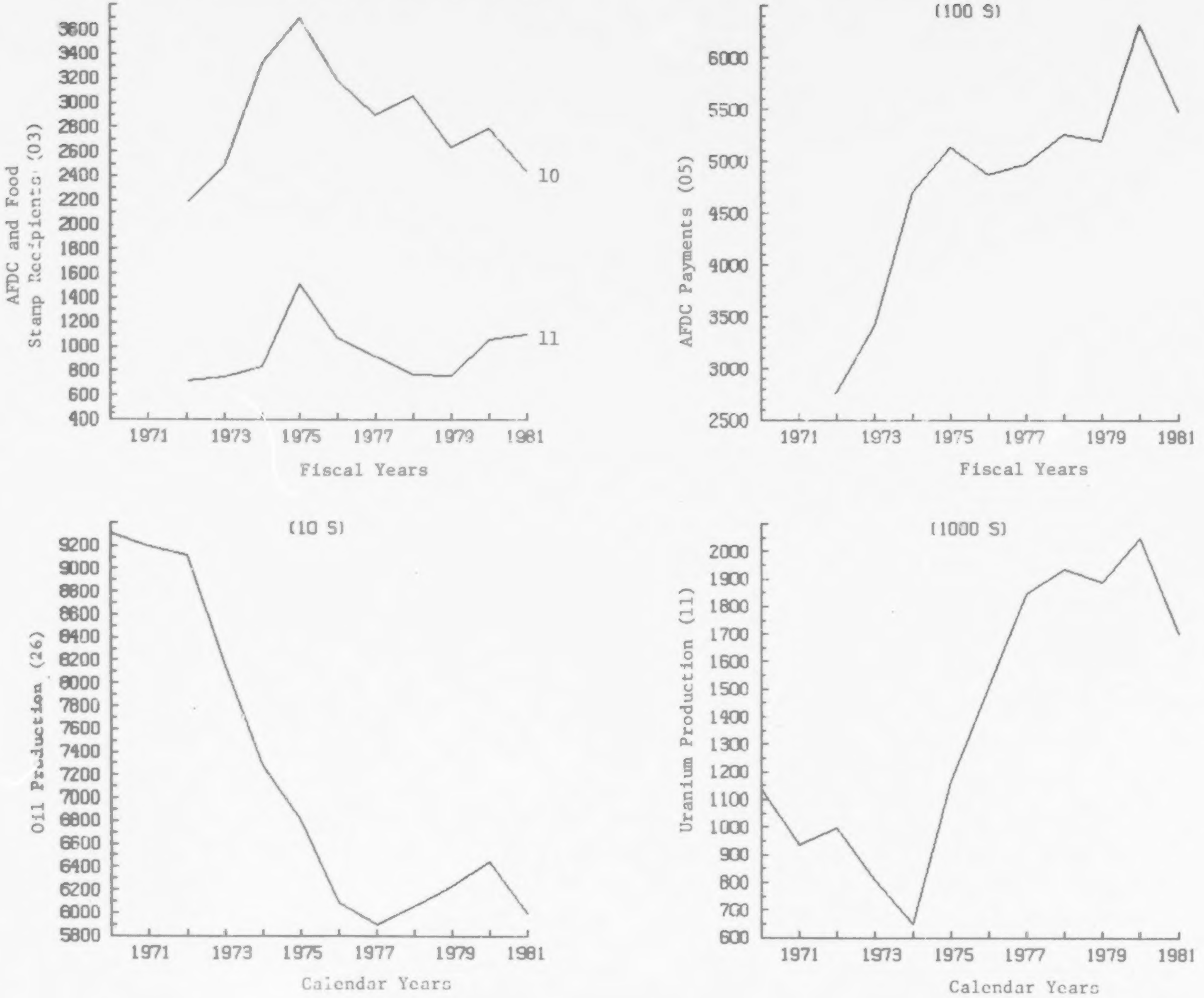


Figure 11b: Fremont County On-Line Data Base



Fremont County, with Lander as the county seat, officially came into being on March 5, 1884. The current century has seen the establishment of a 2.5 million acre Wind River Indian Reservation, mostly in Fremont County. In addition, there has been a resurgence in the county's mining industry, including gold in the South Pass Area (see Summer Minerals Outlook, pg. 3).

NATURAL RESOURCES

Minerals

Fremont County is characterized by a diverse group of mineral deposits, many of which are in commercially mineable quantities, but to date are largely undeveloped. Included in the county's mineral resource base are beryllium, copper, feldspar, gold, iron, jade, tungsten, uranium, sulfur, and phosphate. Only copper and tungsten have never been produced commercially. However, except for iron, sulfur (produced in conjunction with natural gas extraction and processing), and uranium, commercial production has been sporadic. The uranium industry has been hard-hit by slowdowns and stoppages in nuclear power plant construction. Production continues, but the Department of Economic Planning and Development's (DEPAD) 1981 projected taxable output is 17.0 percent below 1980's actual production. Actual data for 1981 and 1982 are not likely to show any improvement over that projection. Iron production at US Steel's Atlantic City mine has been underway since 1962. Although it currently is feeling the impact of the nationwide recession (reduced auto sales have cut the demand for steel), operations are expected to continue at the Atlantic City mine for at least a few more decades.

Fossil Fuels

The first oil well west of Pennsylvania was drilled in Fremont County near Lander in 1884. Despite a 31 percent drop in taxable oil production from 1970 to 1980, assessed valuations rose 329 percent during the same period. Although DEPAD's projection for 1982 indicates a further decline in taxable oil output of 6.9 percent in 1981 from 1980, it remains an important part of the county's economy, and may have received a boost from decontrol of prices not yet evident in the available data.

Taxable natural gas production increased by 13.5 percent from 1970 to 1980. With higher prices now and total decontrol of prices in 1985, production could double or triple in years ahead. The assessed valuation of natural gas output increased more than ten-fold from 1970 to 1980.

Until railroads switched to diesel locomotives, Fremont County coal mines provided fuel for the trains moving through Wyoming. Substantial coal reserves remain, but none are known to be strippable. As a result, commercial production in the foreseeable future is unlikely. As long as cheaper, strippable reserves remain to be mined elsewhere in Wyoming, production from Fremont County's reserves will not be economically viable.

Land

Fremont County is Wyoming's second largest county in terms of land area. Its area of 9,266 square miles is exceeded only by Sweetwater County. Of the total area, 0.2 percent is covered by water. Ownership of land is distributed between the federal government (52.1 percent), Indian Reservation (31.9 percent), state and local government (3.4 percent), and private (12.6 percent). The Bureau of Land Management and the Forest Service administer most of the federal lands.

Water

Most of the county's water supply originates as snowfall in the various mountain ranges in and around Fremont County. Some groundwater supplies are also available, mostly near the higher mountain areas at depths ranging between 600 feet-3500 feet. Much of the available water is already committed to irrigation, mining operations, and municipal uses. Demand for water from mining-related uses is expected to increase. However, because of Federal Reserve Water Rights established by the US Supreme Court decision, known as the Winter's Doctrine, all existing claims are in doubt. This doctrine provides for some exemption of water rights claims from the prior beneficial use criterion for some federal lands such as Indian Reservations. The decision on how much water was reserved for the Indians is currently under consideration and nearing a final decision.

THE PEOPLE

Fremont County's 1980 population of 38,992 represents a 37.5 percent increase over its 1970 population. Eleven percent of its residents are American Indians, a larger minority population than in any other county in Wyoming. With 38,992 people, Fremont County places fourth among Wyoming counties. Not only has there been a substantial change in the number of people, but also in their age composition (see Figure 12). Whereas in 1970 the 5-14 year age bracket had the most people, in 1980 the 35-44 year bracket had the largest number of people. Despite an age

Figure 12: Fremont County; Age by Sex in 5-year Age Groups, 1970, 1980.

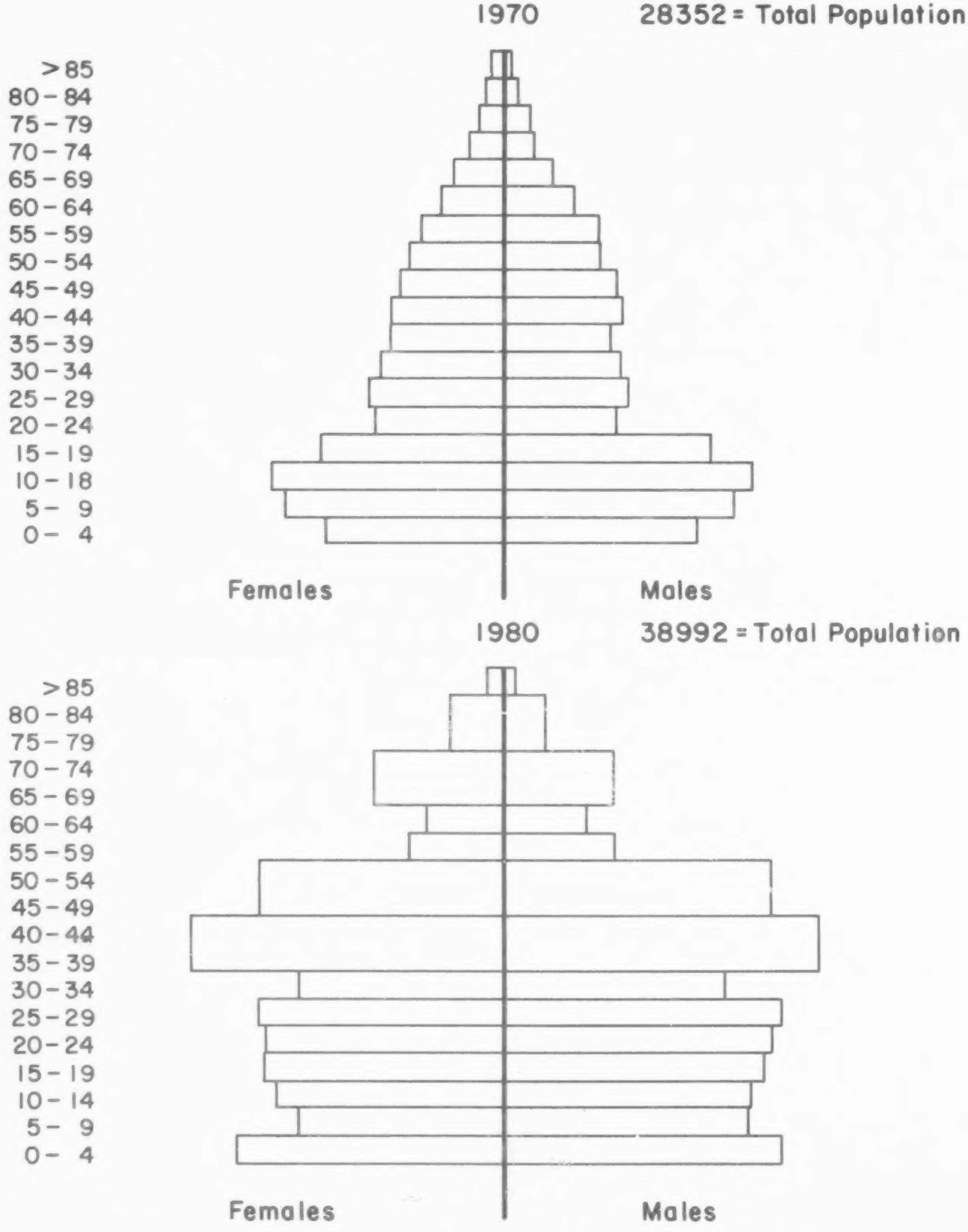


Table 13: Personal Income by Major Source (Thousands of Dollars)*

Source	Wyoming 1979		Fremont County 1979		Fremont County 1970[δ]	
	$	% of Total	$	% of Total	$	% of Total
Farm	122304	3.48	32	.01	8017	10.68
Ag Serv., For., Fish and Other	11765	.34	428	.17	INA	---
Mining	846445	24.12	106251	41.44	16781	22.36
Construction	434772	12.39	19499	7.60	9823	13.09
Manufacturing	177123	5.05	10243	3.99	4106	5.47
Transportation & Public Utilities	348261	9.92	13886	5.42	3318	4.42
Wholesale Trade	152027	4.33	5916	2.31	9615[≠]	12.81
Retail Trade	344783	9.82	25008	9.75		
Finance, Insurance & Real Estate	120475	3.43	7898	3.08	1999	2.66
Services	391429	11.15	28673	11.18	7733	10.31
Government	560224	15.96	34608	13.50	13255	17.66
Total	3509608		256417		75038	

* REIS Data
≠ Sum of wholesale and retail trade
δ Included in total 'other' not shown

distribution quite unlike the state's (see page 35, Spring WQU), the median age is comparable. Wyoming's 1980 median age is 27.1 years, and in Fremont County it is 26.7 years. Births, deaths, divorces, and marriages increased 63.7, 40.3, 113.0, and 68.3 percent respectively, from 1970 to 1980.

Social service recipients, as measured by Aid to Families with Dependent Children (AFDC), did not increase in number as fast as the population from 1972 to 1980. AFDC recipients increased 28.2 percent during that period while population grew by 30.0 percent. However, food stamp recipients increased by 46.9 percent from 1972 to 1980. The combined effect of inflation and more recipients resulted in nearly doubling AFDC payments from 1972 to 1981. On the brighter side, 1981 AFDC payments are down 13.2 percent from 1980.

THE ECONOMY

From 1970 to 1979, personal wage and salary income increased 242.7 percent. Most of the real increase (allowing for inflation) is due directly or indirectly to the growth of the mining sector. Mining's share of the total increased by 19.08 percentage points from 1970 to 1979, while farming nearly ceased, down from 10.68 percent of total personal income in 1970. Only three sectors other than mining (transportation and public utilities, finance, insurance and real estate, and services,) were able to attain a larger share of total income in 1979 than 1970, and the increase in each was a percentage point or less. In spite of the tremendous growth in Fremont County's total personal income, its per capita income of $8,186 in 1979 ranked only 17th among Wyoming's 23 counties.

Tourism, probably the county's second largest economic enterprise, impacts several of the sectors listed in Table 13. That conclusion is supported by the clearly cyclical nature of Lodgings sales tax collections and gasoline gallonage data, each with peaks in the third quarter of each year. Visitors are attracted by Fremont County's numerous scenic and historic features, and also by the location of a major route (US Highway 287) to Grand Teton and Yellowstone National Parks within the county.

The Wyoming State Training School and Central Wyoming College are also major employers and income providers within the county.

OUTLOOK

Fremont County's future contains indications of increased prosperity, and also some cause for concern. The long-term outlook for the nation is for continued increases in total leisure time, which in turn will increase tourism. In addition, a greater percentage of tourism is expected to be oriented towards outdoor recreation. Certainly, Fremont County will benefit from those trends.

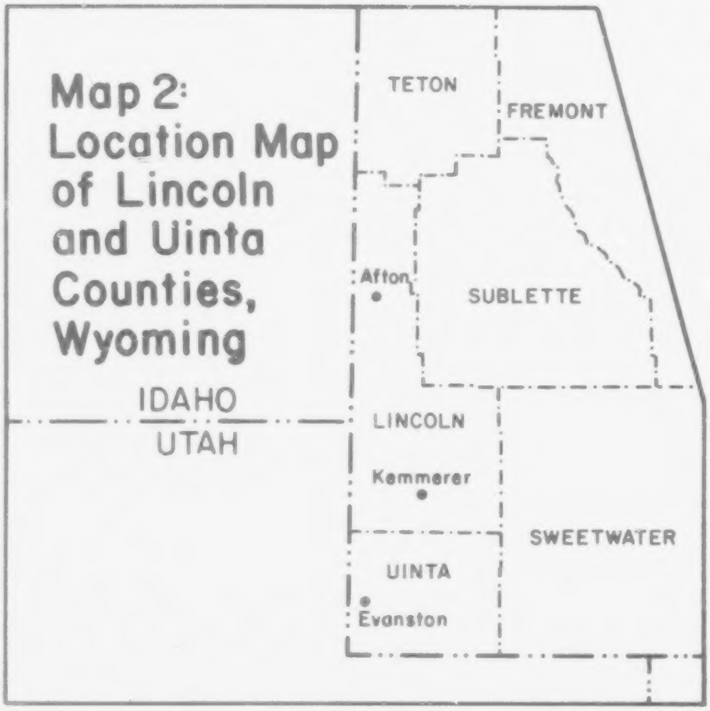
Recent decontrol of oil prices and the scheduled 1985 decontrol of natural gas prices are each likely to have a very positive impact on the county's economy. On the other hand, there does not appear to be any sign that a turn-around can be expected soon in the declining demand for uranium, and hence the slump in that important component of Fremont County's economy.

Another major cause for concern is the uncertainty surrounding the ownership of many water rights within the county. The decision on how much water is covered by the Federal Reserve Water Rights will have a major impact on the county's future.

Lincoln County Profile

by John Merrifield and Julie Gizinski

PHYSICAL CHARACTERISTICS AND CLIMATE



Map 2: Location Map of Lincoln and Uinta Counties, Wyoming

Lincoln County is located in southwest Wyoming and spans nearly one-half of Wyoming's western border (Map 2). Lincoln County is to the immediate north of Uinta County, bordered by Sweetwater and Sublette Counties on the east, and bordered by Teton County to the north. To the west are the states of Utah and Idaho. Topographically, this county is characterized by valleys bordered by mountain ranges in the northern regions, and by sagebrush covered plains in the south. Star Valley is one of the major physiological features of Lincoln County. It is approximately seven miles wide and fifty miles long. The valley is comprised of rugged peaks cut by deep gorges, with flat meadows intermingled throughout the area. The highest summit is 6000 feet above the Snake River, and elevation variability of 6000 to 7000 feet is found throughout the county.

The climate of Lincoln County can be described as arid to semi-arid. Temperature range from an average of 17 degrees during the month of January to an average of 63 degrees during July. In general, temperatures are cooler in Lincoln County than the majority of other Wyoming counties.

HISTORY

Lincoln County was named for President Lincoln and was a part of Uinta County until February 20, 1911. Kemmerer was established as its county seat at this time.

The settlement and development of this county is based primarily upon two industries. Agriculture was the initial industry in the north and mining accounted for the development of the southern portion of the county. Also contributing to the growth of Lincoln County were the Mormon settlements in the Star Valley area. As a result of the conducive conditions, dairy farming became the major industry for this region.

Before any permanent settlements were established, Lincoln County was inhabited by trappers, mountain men, and Indians. As early as 1812, fur trappers are known to have worked this area. During subsequent years, settlers venturing west via the Lander cut-off of the Oregon Trail traveled through this area. An historical landmark can be found on the limestone rock on the west side of the Green River where travelers registered their passing. Included among the names is that of Jim Bridger.

NATURAL RESOURCES

Fossil Fuels

Lincoln County coal is one of the highest grade coals in Wyoming. The majority of reserves are of bituminous rank. As a result of the folding and faulting characteristic of the Overthrust Belt area, the coal seams are long narrow belts trending north and south.

According to a 1976 study done by the Department of Economics Planning and Development (DEPAD), coal resources are estimated to be 2.8 billion tons in Lincoln County. Coal has been mined in Western Wyoming since the 1860s with total taxable production in 1981 projected by DEPAD to be 52,820,000 short tons in Lincoln County. This figure represents a 5.85 percent increase in production since 1980, and a 93.62 percent increase since 1975. While production seems to have leveled off recently, the dramatic increase since 1975 indicates the significant role this resource plays in Lincoln County.

Table 14: Lincoln County Profile

Calendar Years	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
1. Births (03)	205	194	179	198	223	238	264	282	321	324	389	INA
2. Deaths (03)	81	93	66	79	76	70	77	63	79	82	79	INA
3. Divorces (03)	23	36	30	38	20	51	37	45	44	66	70	INA
4. Marriages (03)	61	78	75	68	91	75	80	122	112	89	142	INA
5. Oil Production (26)	2551	INA	2010	1522	1955	1889	1718	1718	1609	1322	2288	2500[1]
6. Valuation of Oil Production (10)	8028	INA	6760	6409	18492	16631	15487	17869	18004	24825	61242	INA
7. Natural Gas Production (20)	70133	INA	62625	55268	58850	77141	165216	86918	97208	111673	199350	200000[1]
8. Valuation of Natural Gas Production (10)	11580	INA	10857	13894	18829	33514	91987	75453	119616	165907	425054	INA
9. Coal Production (11)	15834	INA	21029	29467	33399	27280	42010	50863	49578	50832	49898	52820[1]
10. Valuation of Coal Production (10)	33569	INA	56148	105491	163987	180050	323262	440859	496917	584674	664541	INA
Fiscal Years	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
11. AFDC Recipients (03)	INA	INA	186	237	295	315	419	519	462	485	571	563
12. Food Stamp Recipients (03)	INA	85	120	97	122	128	170	136	104	110	202	199
13. AFDC Payments (05)	INA	INA	25476	34282	45966	50223	78979	103391	92565	111040	144791	139683
Calendar Quarters	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81	1/82
14. Hotel, Motel & Camp Sales & Use Tax (05)	12443	18072	11550	16963	19723	28972	27289	14457	25931	36324	25917	25925
15. Net Collections, Sales & Use Tax (05)	405031	446263	582024	738519	987523	1072526	999720	860815	1194597	1115482	1180068	1354370
16. Liquor Sales (05)	198591	232725	262407	128124	197599	2626222	317935	152169	246586	303997	325885	INA
17. Gasoline Gallonage (22)	2395223	3193441	2471264	1913787	2208049	3403269	2392179	2024242	2594519	3477943	2673031	2500000[2]
Calendar Years	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
18. Population* (03)	8640	9300	9200	9000	9400	9900	10500	11000	11300	11900	12177	INA
Fiscal Years	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
19. State Board of Equalization Valuations (05)	28878734	35106172	39031440	42792971	51765248	62110167	66038862	88508219	100290874	110354592	126265314	167448517
20. Locally Assessed Property Valuations (05)	15653474	15955340	16585540	17714659	20046669	20272312	24550006	27548409	26550242	28314285	30037422	33028978
21. Cigarette Tax Dist. (05)	34455	39718	38941	45025	51691	41880	47584	49221	50572	59067	68234	72163

*1971 through 1979 are estimates made by the Bureau of Economic Analysis, not actual counts as in 1970 and 1980.

[1] Projections by DEPAD.

[2] Estimate based on trend and January, February data.

Figure 13a. Lincoln County On-Line Data Base

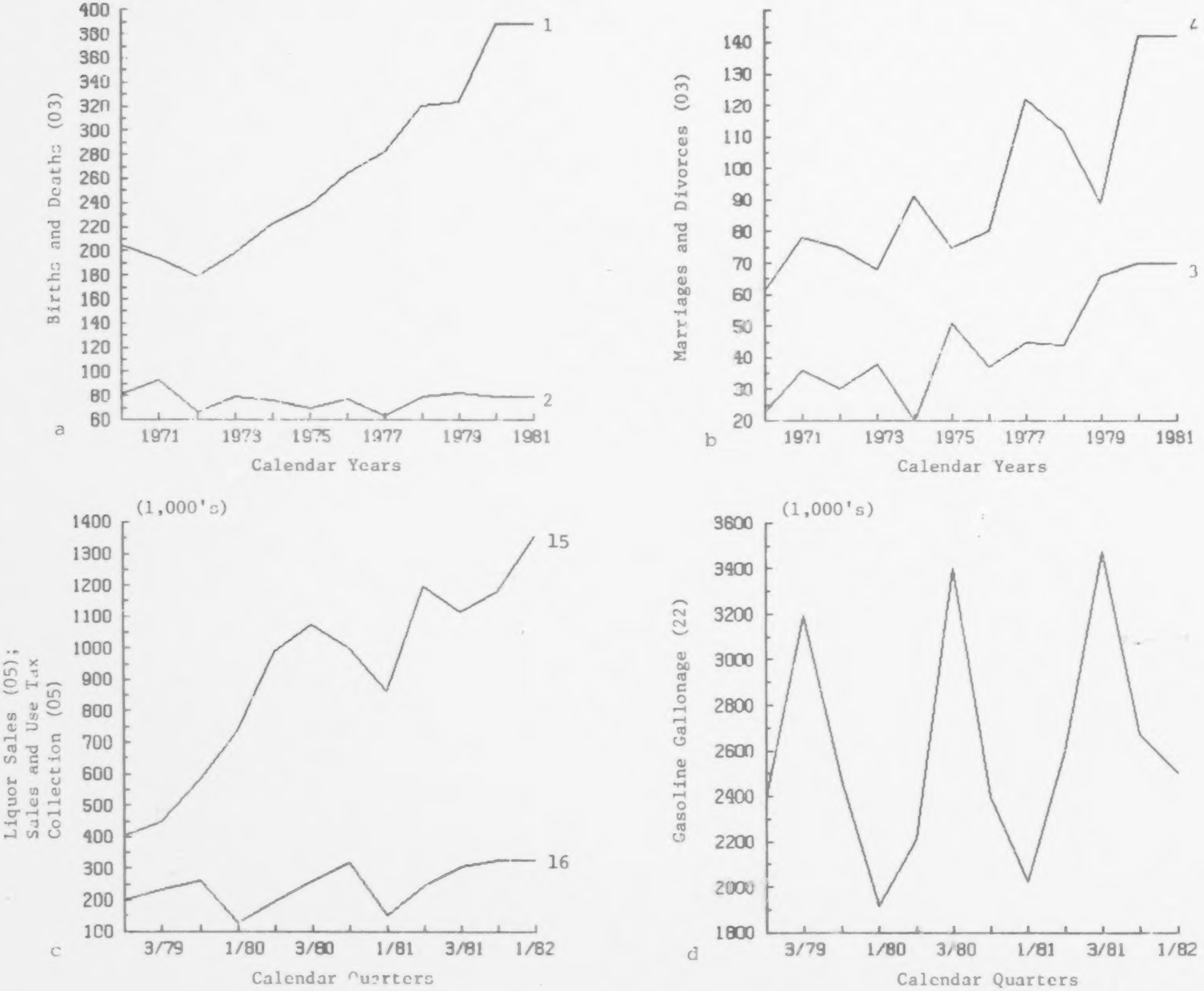
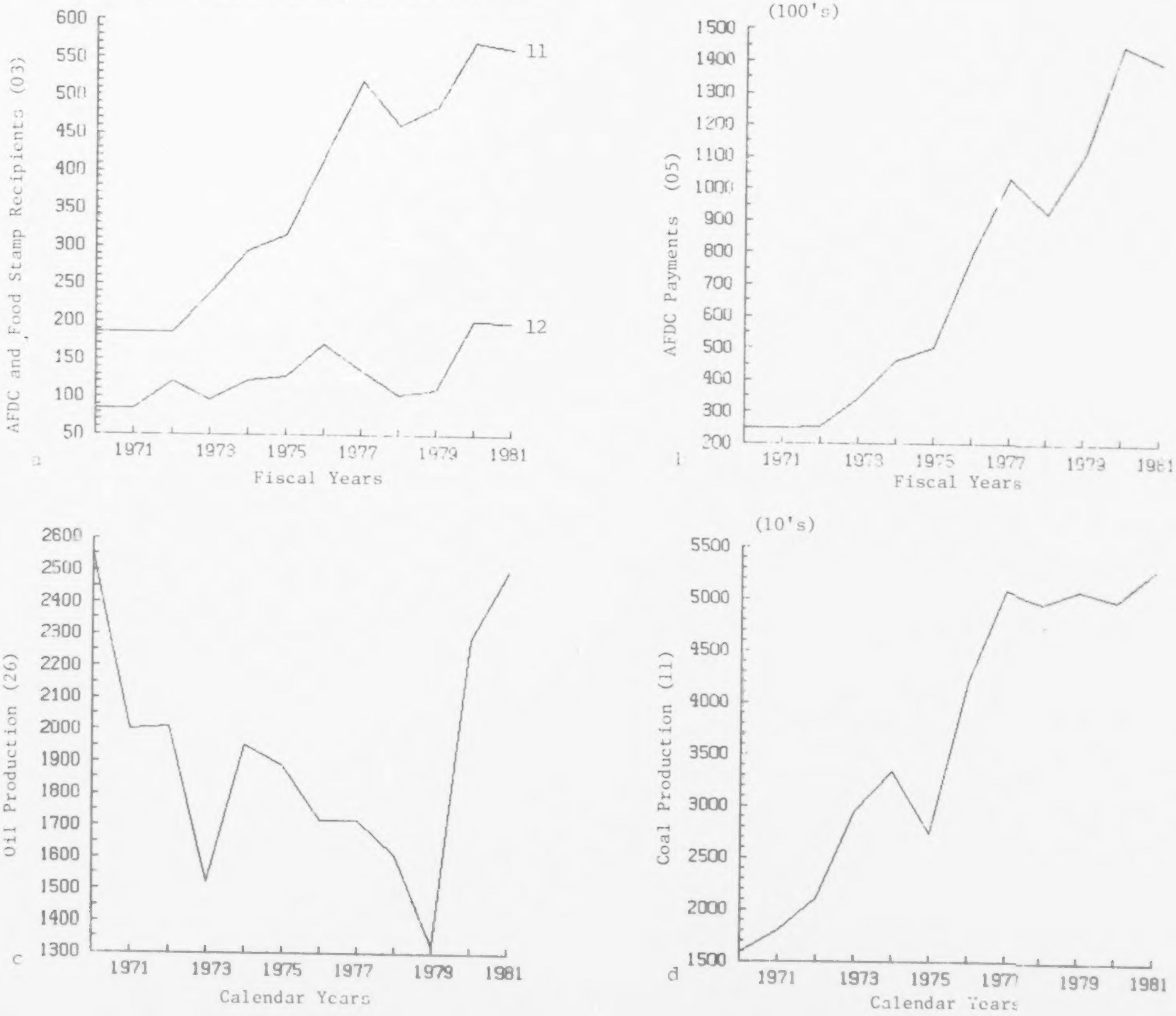


Figure 13b: Lincoln County On-Line Data Base



Oil and Natural Gas

In the past, oil and natural gas have been main components of mineral production in Lincoln County. However, in comparison to other Wyoming counties, Lincoln County has not been considered a major producer of these resources. The 240 percent increase from 1978 to 1980 in the assessed valuation of oil output reflects the increased price of oil more than increases in output. In 1981, Lincoln County's projected taxable output is 250,000 barrels of oil. This represents a 28 percent increase since 1974 when Lincoln County oil production constituted .2 percent of total state production. Projected 1981 natural gas production was 20 million MCF. This represents a dramatic increase of 240 percent since 1974, when natural gas production in this county was 2.2 percent of the state total. With substantial increases in production, as well as price, the assessed valuation of the gas output rose 2,158.00 percent from 1974 to 1980. As a result of this substantial increase, it appears that Lincoln county is rapidly becoming recognized as a major producer of natural gas.

Minerals

Minerals found in Lincoln County include phosphate, vanadium, uranium, oil shale, copper, gold, silver, and bentonite.

Water

Along the western border, Lincoln County is drained by the Bear River. This source is used for irrigation and industrial needs. The communities located in the southern and eastern regions obtain their water supply from the tributaries of the Green River and various underground sources.

Land

The land ownership of Lincoln County is approximately 75 percent publicly owned. The Star Valley area constitutes the largest concentration of private ownership with the Cokeville area, the Ham's Fork near Kemmerer, and the LaBarge area representing the other main areas of private ownership. The U.S. Forest Service and the Bureau of Land Management administer approximately 34 percent and 32 percent respectively of the county lands. Uses of this land include mineral extraction, timber harvesting, grazing, recreation, and wildlife.

THE PEOPLE

The population of Lincoln County in 1980 was 12,177. Like the state itself, Lincoln County has experienced significant growth. The 1980 population figure represents a 41 percent increase since 1970 (same growth rate as the state). The majority of this population increase has been apparent in the southern portion of the county where mining is prevalent and has experienced rapid growth.

As a result of increased mining and production, those falling in the 20-24 age bracket are expected to increase. It is estimated that, by 1985, this age group will constitute 34 percent of the population in Lincoln County. By the same rationale, it is predicted that the percentage of senior citizens in this county will increase far less rapidly and will comprise approximately 19 percent of the total population by 1985.

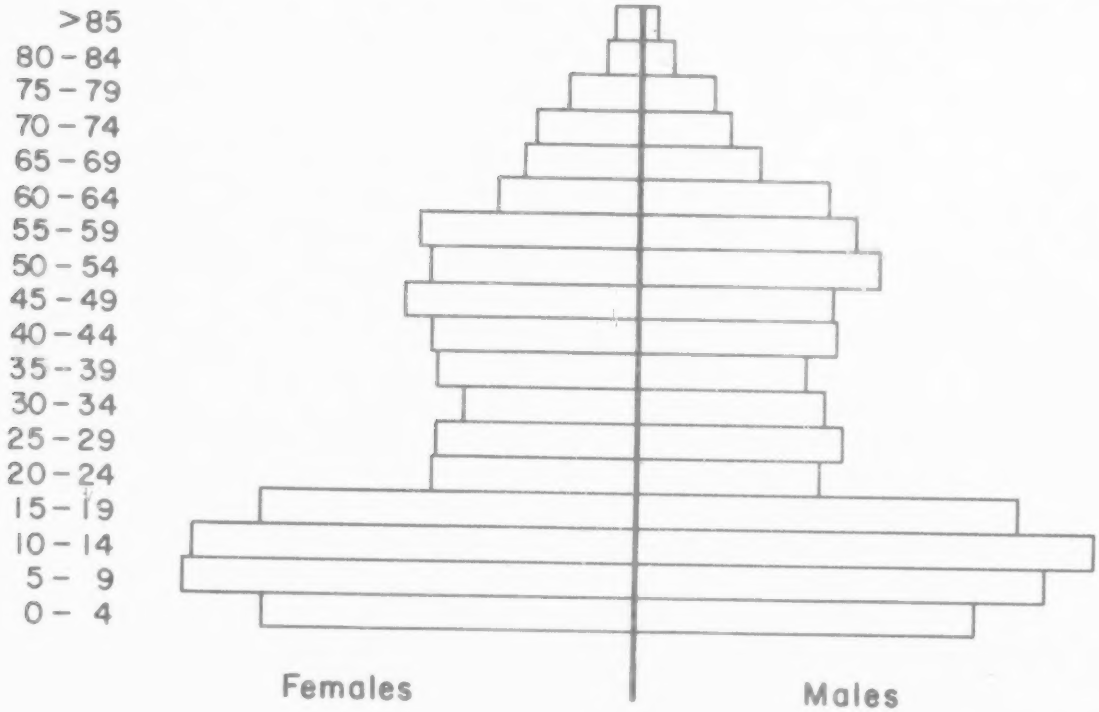
According to figure 13a, and possibly as a result of a younger, population, the number of marriages rose by 60 percent between 1979 and 1980 and by 133 percent since 1970. The number of divorces has also grown but by a smaller amount. Between 1979 and 1980, the number of divorces increased by 6.06 percent. The number of births between 1979 and 1980 grew by 20 percent, and the number of deaths during the same period fell by 3.66 percent.

In 1979, the largest percentage of personal income was attributable to mining (39.66 percent), more than 50 percent larger than the state percentage of 24.12. The government sector accounted for 10.51 percent of the total in Lincoln County, thus making it the second largest employer in the county. The median income is approximately $12,000, according to the Land Use and Housing Elements study conducted by the Lincoln-Uinta County Association of Governments.

Although one might expect the number of social welfare recipients to increase along with population, this has not been the case in Lincoln County. According to the data in Figure 13b, the number of Aid to Families with Dependent Children (AFDC) recipients in 1981 has fallen by 1.4 percent since 1980 and by 34.37 percent since 1976. The same is true for food stamp recipients. In this case the percentage changes from 1976 and 1980 to 1981 respectively are -1.49 percent and -17.05 percent.

Figure 14: Lincoln County; Age by Sex in 5-year Age Groups, 1970, 1980.

1970 8640 = Total Population



1980 12177= Total Population

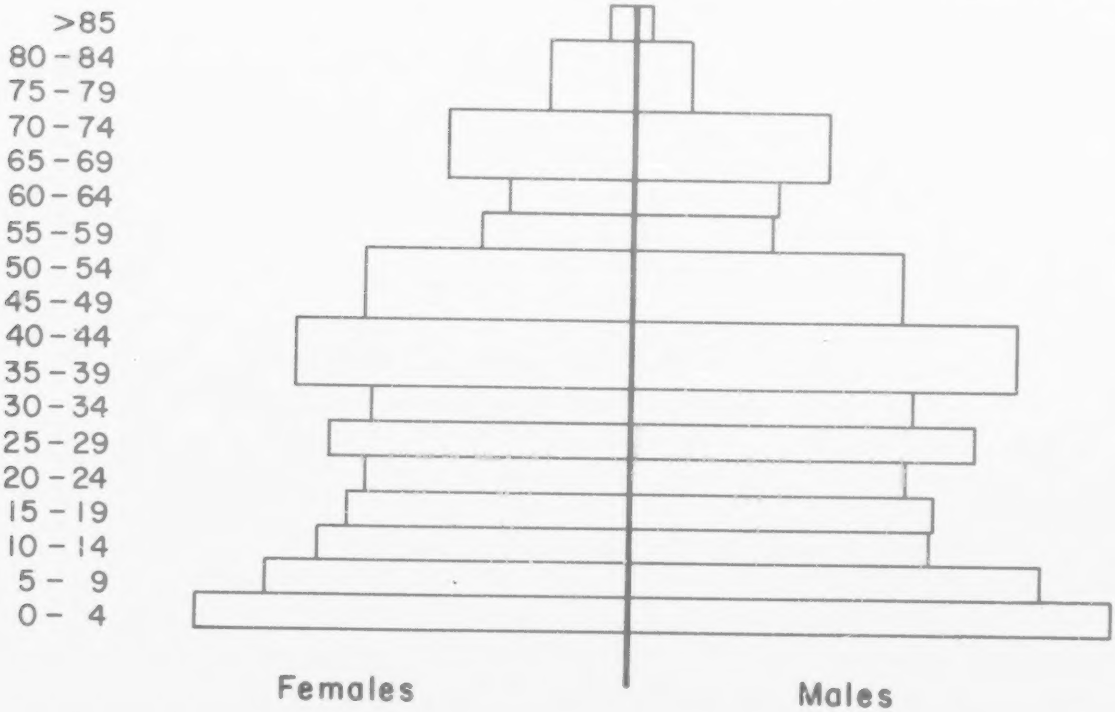


Table 15: Personal Income by Major Source (Thousands of Dollars)*

Source	Wyoming 1979		Lincoln County 1979		Lincoln County 1970≠≠	
	$	% of Total	$	% of Total	$	% of Total
Farm	122304	3.48	5019	6.16	7411	24.66
Ag Serv., For., Fish, and Other	11765	.34	273	.34	INA	---
Mining	846445	24.12	32299	39.66	2565	8.54
Construction	434772	12.39	7219	8.86	D≠	---
Manufacturing	177123	5.05	4835	5.94	1578	5.25
Transportation & Public Utilities	348261	9.92	D≠	---	2763	9.19
Wholesale Trade	152027	4.33	D≠	---		
Retail Trade	344783	9.82	5487	6.74	3174δ	10.56
Finance, Insurance & Real Estate	120475	3.43	2590	3.18	523	1.74
Services	391429	11.15	3019	3.71	1381	4.60
Government	560224	15.96	8556	10.51	4245	14.13
Total	3509608		81444		30050	

* REIS Data
≠ Not shown to avoid disclosure of confidential information, data is included in totals
δ Sum of wholesale and retail trade
≠≠ Included in total 'other' not shown

ECONOMY

The economy of Lincoln County is based upon several industries, with mining, government, and construction as the main components. The major economic source for southern Lincoln County is mining and other related activities, while northern Lincoln County still relies on agriculture and lumber operations to a large extent.

While the percent of income due to agriculture has dropped to 6.16 percent in 1979 from 24.66 percent in 1970, the income generated by mining has grown from 8.54 percent in 1970 to 39.66 percent of the total in 1979. Such a transition indicates not only a rapidly expanding industry but also the increased value of fossil fuels. It is likely that this industry will continue to dominate the economic climate of Lincoln County as long as national policy and economic conditions in this industry continue to favor fossil fuels.

Another important economic sector in Lincoln County is that of the government. In 1979, the government accounted for 10.51 percent of total income generated. The only industry which generated a larger percentage was mining. Construction captured the third largest percentage of total income generated. In 1979, it constituted 8.86 percent of the total. This is due in part to the need for additional housing and municipal infrastructure as a result of the growth in population which Lincoln County has experienced over recent years.

Growth of Lincoln County's economy is also reflected in the collection of tax revenues, sales of liquor, and gasoline sales. Most notably, the property valuations assessed by the State Board of Equalization, which reflect the value of business and industrial properties, were over 480 percent higher in fiscal year 1981 than in 1970. Retail sales activity, as indicated by sales tax collections, have also grown steadily with only seasonal fluctuations over the twelve quarters reported. First quarter 1982 sales and use tax collections are 234 percent higher than in the second quarter of 1979.

OUTLOOK

Lincoln County has experienced rapid growth in one industry, mining. As a consequence, the population of the area has also grown. If demand for energy sources continues at the pace experienced over recent years, one can predict that Lincoln County will continue to grow as well. The resources available in Lincoln County are not only varied but in many cases extremely abundant. Therefore, existing industries will continue to expand and prosper as new industries develop and explore new frontiers.

Uinta County Profile

by John Merrifield and Julie Gizinski

PHYSICAL CHARACTERISTICS AND CLIMATE

Uinta County (Map 2) is located in the southwestern corner of the state and is characterized by a mixture of rolling, sagebrush covered foothills, shallow basins, and valleys. Uinta County is bordered by Lincoln County to the immediate north, Sweetwater County to the east, and Utah to the south and west.

The elevation of this county ranges from approximately 6,450 feet along the northern border reaching its highest point of 9,778 feet in the south. Due to the lower elevation of the northern portion, the land here is predominantly a series of sagebrush covered hills. However, the south is characterized by the forested Uinta range.

The climate of Uinta County can be described as cool, short summers, cold winters, and a predominantly cool fall and spring. Temperatures range from an average of 14 degrees in January to a high 60 degree average in July. The growing season in this county generally spans 60 to 90 days. Precipitation varies throughout the area with the northwest receiving from five to nine inches and the southern region receiving from 15 to 19 inches.

HISTORY

The earliest inhabitants known to Uinta County were nomadic Indian tribes who followed the herds of game prevalent in the valleys. The white man arrived in Uinta during the 1820s when fur trading was developing in the area. In 1825, the first major rendezvous was held on Henry's Fork of the Green River. By 1869, the Union Pacific Railroad line passed through the town of Evanston. The presence of the railroad provided the incentive for an expanded timber industry. Large quantities of this timber was transported to the charcoal kilns located east of Piedmont. Although little remains of these kilns, the timber industry of Uinta County is still an important part of the economy.

Originally, Uinta County included what are today parts of Lincoln, Teton, and Sublette Counties. Uinta County was the first county created under Wyoming law in 1869 and was 50 miles wide and 200 miles long. Today it is the second smallest county with a land area of 1,324,800 acres.

NATURAL RESOURCES

Fossil Fuels

Uinta County contains an estimated two billion tons of coal, according to the Review of Wyoming Coal Fields, 1976. Three fourths of this amount is high grade bituminous. However, this coal is more difficult to extract than the 500 million tons of subbitiminous coal. The coal deposits are located in a north-south belt running through the center of the county. Due to the high heat content of this coal, greater development of the coal industry is predicted.

Oil production in Uinta County has experienced rapid development since 1975 due to new mineral discoveries. Table 16 indicates that oil production has risen dramatically from zero in 1974 to a projected (by DEPAD) all time high of 84,750 barrels in 1981. The assessed valuation of Uinta County's oil output rose predictably during the final years of record price and output increases combined to cause assessed valuation to rise by 656 percent from 1978 to 1980. Growth such as this clearly indicates that oil is rapidly becoming a major source of income for the county.

Although natural gas production declined in Uinta County between 1970 and 1976 (see Table 16), production has steadily increased since 1977. This increased production is attributable to the major discoveries made in Uinta County and the adjacent area referred to as the Overthrust Belt. Major fields and discovery wells include the Ryckman Creek Field, Yellow Creek, and Whitney Canyon. One of the more recent discoveries is the Carter Creek field. Again, the combined impact of increases in output and price on the assessed valuation of gas production was substantial, +803 percent from 1978 to 1980.

Water

Due to the semi-arid climate of Uinta County, irrigation is required for the growth of crops. Consequently, a stable water supply is not only necessary for agriculture, but also for the growing population. Data obtained by geological studies indicate that medium to large ground water supplies are available along the Bear River and the neighboring uplands. Another source of

Table 16: Uinta County Profile

Calendar Years	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
1. Births (03)	128	148	141	165	216	226	268	286	285	337	425	INA
2. Deaths (03)	62	54	66	67	66	75	78	74	73	82	83	INA
3. Divorces (03)	27	34	28	32	69	50	70	53	38	67	95	INA
4. Marriages (03)	277	260	325	304	162	187	177	188	162	148	175	INA
5. Oil Production (26)	0	INA	0	0	0	110	312	5297	15628	36336	67356	84750[1]
6. Valuation of Oil Production (10)	0	INA	0	0	0	1158	3751	61550	198186	512972	1498754	INA
7. Natural Gas Production (20)	41384	INA	40103	38515	43658	36364	34068	36243	50617	229495	240532	250000[1]
8. Valuation of Natural Gas Production (10)	6499	INA	6350	8893	11471	10979	9775	13757	40197	403461	362809	INA
Fiscal Years	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
9. AFDC Recipients (03)	INA	INA	228	203	231	292	426	474	494	546	609	647
10. Food Stamp Recipients (03)	INA	55	84	74	69	103	172	135	106	97	146	166
11. AFDC Payments (05)	INA	INA	37273	31982	35056	47708	77837	98984	97969	114929	140986	157722
Calendar Quarters	2/79	3/79	4/79	1/80	2/80	3/80	4/80	1/81	2/81	3/81	4/81	1/82
12. Hotel, Motel & Camp Sales & Use Tax (05)	45781	63518	53386	71570	67985	78748	92836	69082	93324	104695	86121	113064
13. Net Collections, Sales & Use Tax (05)	603678	613620	1104185	1251438	1708263	1770367	1815664	2197792	3016314	3230810	4085548	4095231
14. Liquor Sales (05)	352384	395008	480742	276683	382531	525336	522771	374134	555186	618156	797095	INA
15. Gasoline Gallonage (22)	3824864	4179007	3875396	3359494	3964156	5492938	4561503	4140800	5764129	6171371	4991945	4600000[2]
Calendar Years	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
16. Population* (03)	7100	7400	7800	8300	8700	9500	9600	10100	10700	11500	13021	INA
Fiscal Years	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981
17. State Board of Equalization Valuations (05)	11358225	11684653	12105493	12277946	13080230	13529262	14130579	14521113	20930270	38109194	107306209	205658318
18. Locally Assessed Property Valuations (05)	12086624	12216173	12695466	13168508	14396993	13860273	15028640	17049325	17677047	19940248	24950580	33962654
19. Cigarette Tax Dist. (05)	31979	35140	42354	47258	47348	65414	54803	60050	74978	86067	112158	139917

*1971 through 1979 are estimates made by the Bureau of Economic Analysis, not actual counts as in 1970 and 1980.

[1] Projections by DEPAD

[2] Estimate based on trend and January, February data.

Figure 15a: Uinta County On-Line Data Base

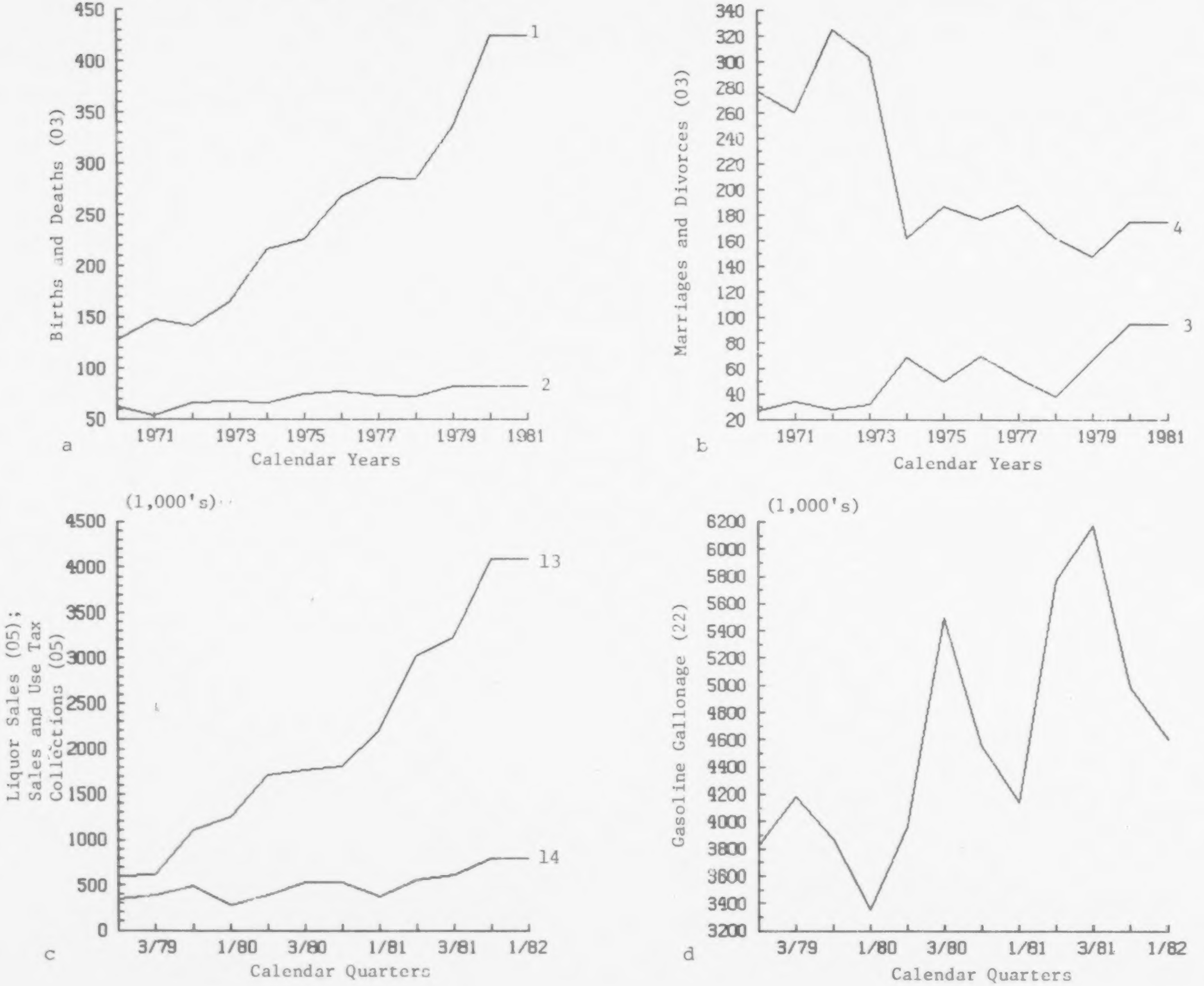
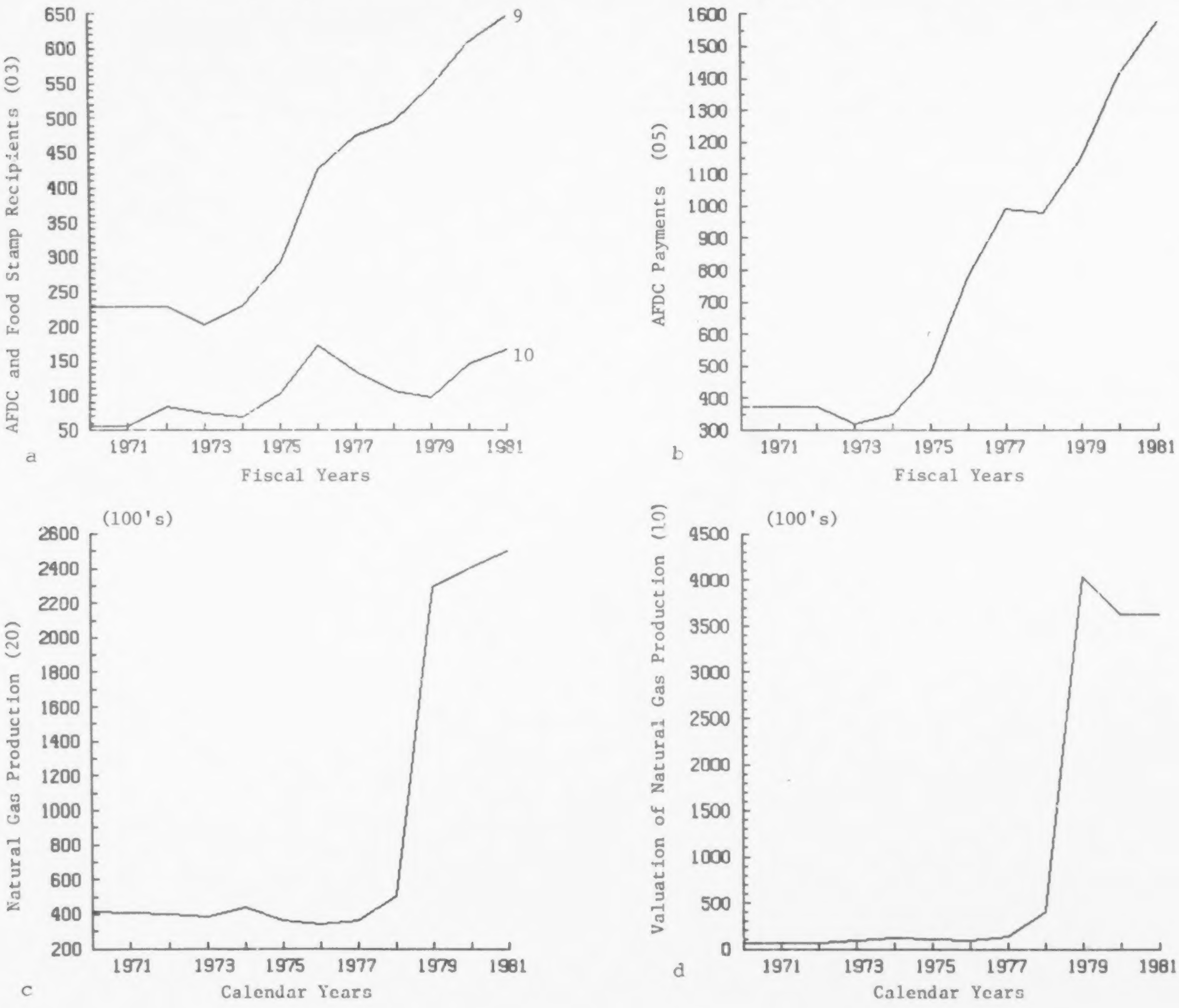


Figure 15b: Uinta County On-Line Data Base



supply is found in the older formations adjacent to the valley. Nonetheless, the growth and development of Uinta County will depend on the availability of sufficient water supplies. Anticipated development of Uinta County's substantial oil shale reserves will create an additional, significant source of pressure on the region's water supplies.

Land

A large portion of the land in Uinta County is considered range land with approximately 42 percent of it being administered by the Bureau of Land Management. Land devoted to agriculture is located in the eastern portion of the county and land committed to forestry is found in the southern part of the county.

As of 1979, approximately 57 percent of the land was owned privately. The remaining 43 percent is publically owned and is distributed primarily between the U.S. Forest Service and the Bureau of Land Management.

THE PEOPLE

The population of Uinta County in 1980 was 13,021. This represents a 13.23 percent increase since 1979 and a 83.39 percent increase since 1970 (See Table 16). The significant growth rate since 1970 can be attributed to the rapidly expanding mining industry which has attracted more people to this part of Wyoming. A large portion of the growth in population is evident in the Bridger Valley area. This area's growth is due to the expansion of trona mining operations.

Another effect of growth on the population of Uinta County is evident from its demographic characteristics (Figure 16). The median age of this county has dropped from 29.3 years in 1970 to 26.4 years according ~~to~~ the February 1977 special census. If the mining sector of Uinta County continues to grow at the current pace, the median age of the population could drop further as younger people are drawn to the opportunities available in this county.

According to the data presented in Table 16, the number of marriages, divorces, and births have also risen since 1979. In 1980, there were 175 marriages recorded in Uinta County. While this represents a 18.24 percent increase since 1979, the number of marriages in 1980 compared to the number in 1970 decreased by 36.82 percent. This decline could be due to more residents choosing to marry in the larger urban areas located both east and west of the county. That this could happen is not that surprising. Most of the new residents of Uinta County (since 1970) are young immigrants who are likely to have strong cultural and social ties to another area. The number of divorces in 1980 reached 95, representing a 41.79 percent increase between 1979 and 1980. The number of births grew by 26.11 percent over the same period. The number of deaths have remained fairly constant with a small increase of 1.22 percent between 1979 and 1980.

The number of social welfare recipients (AFDC recipients and food stamp recipients) has also increased. In 1981, 647 AFDC recipients were recorded. This is a 183 percent increase since 1972 when only 228 recipients were accounted for. The number of food stamp recipients has also experienced significant increases since 1972. Specifically, this datum has risen by 97.6 percent.

ECONOMY

According to a socioeconomic study of Uinta County, the civilian labor force and employment have increased by approximately 67 percent and 75 percent respectively, between 1970 and 1978. Uinta County has had a low unemployment rate due to more rapid increases in employment opportunities than labor force. However, with the recent decreases in fuel prices and a deepening national recession, low unemployment may not prevail for long.

Personal Income by Major Sources are listed on Table 17. Transportation, Retail Trade and Government accounted for 48.17 percent of income generated in the county for 1979. Although data is not included for the mining sector of the economy, one can assume that it also generates a substantial share of the county's income. Agriculture has declined substantially since 1970 when it constituted 21.29 percent of the total income generated. In 1979, agriculture accounted for only 3.53 percent of the total.

The prominent role of transportation and retail trade (including gasoline service stations which serve tourists, other highway related traffic, and local residents) suggests that, along with the increased local demand resulting from the population increases, Uinta County is experiencing a growing tourist trade. Indicators of this growth include liquor sales, total sales, and use tax collections and hotel, motel and camp sales tax collections. Those data can be found on Table 16. Those data reflect expected seasonal trends. For example, in the area of hotel, motel and camp sales tax collections, the third quarter of each year dominates. Liquor sales and gasoline gallonage reflect similar seasonal trends, as well. However, the area of net collections of sales and use tax seem to reflect a steady pace of growth throughout.

Figure 16: Uinta County; Age by Sex in 5-year Age Groups, 1970, 1980.

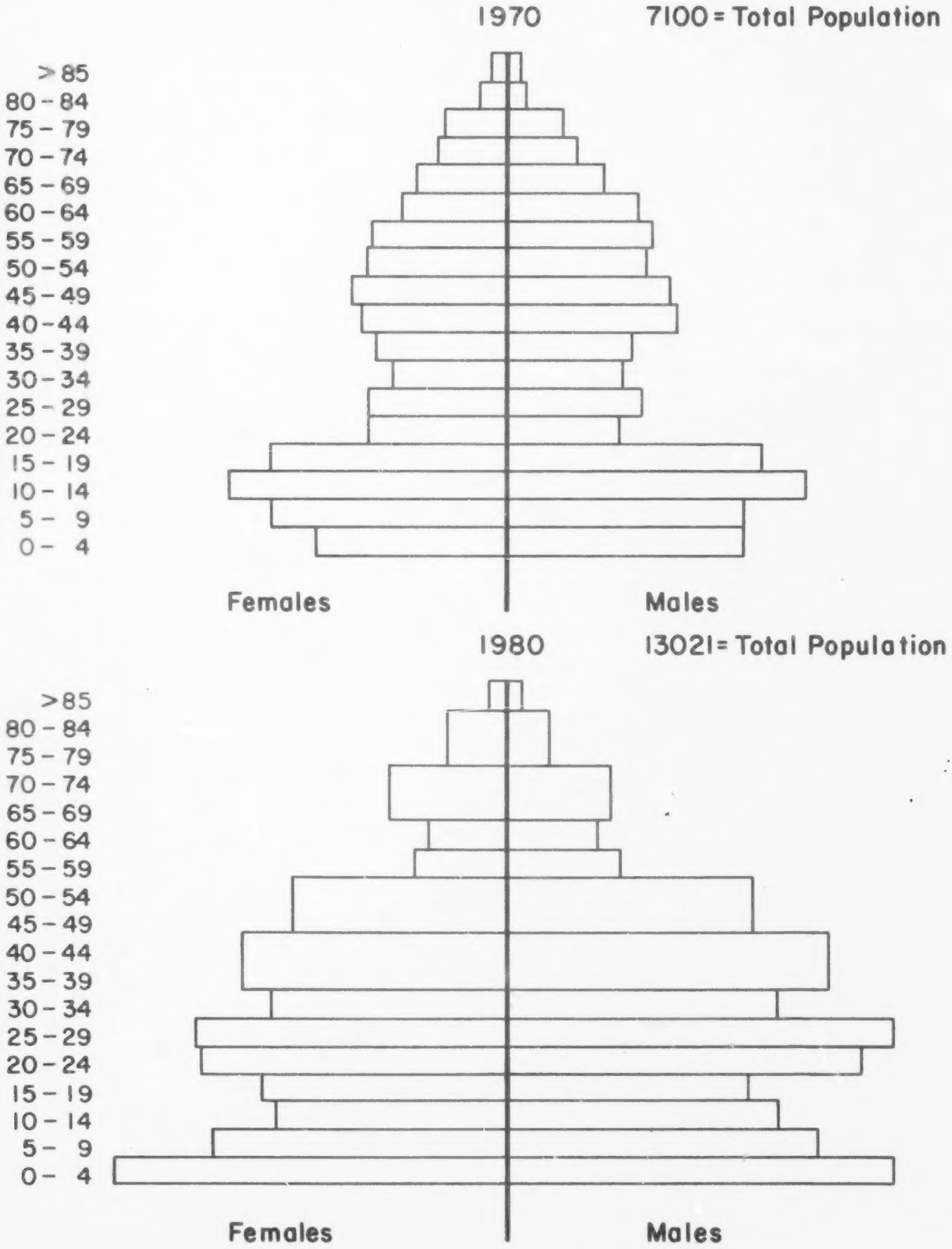


Table 17: Personal Income by Major Source (Thousands of Dollars)*

Source	Wyoming 1979		Uinta County 1979		Uinta County 1970≠≠	
	$	% of Total	$	% of Total	$	% of Total
Farm	122304	3.48	2439	3.53	4218	21.29
Ag Serv., For., Fish, and Other	11765	.34	131	.19	INA	---
Mining	846445	24.12	D≠	---	D≠	---
Construction	434772	12.39	2586	3.74	823	4.15
Manufacturing	177123	5.05	1330	1.92	D≠	---
Transportation & Public Utilities	348261	9.92	13495	19.53	4172	21.06
Wholesale Trade	152027	4.33	1608	2.33		
Retail Trade	344783	9.82	7698	11.14	2625δ	13.25
Finance, Insurance & Real Estate	120475	3.43	1416	2.05	392	1.98
Services	391429	11.15	D≠	---	D≠	---
Government	560224	15.96	12089	17.50	5716	28.85
Total	3509608		69095		19812	

* REIS Data
≠ Not shown to avoid disclosure of confidential information, data is included in totals
δ Sum of wholesale and retail trade
≠≠ Included in total 'other' not shown

Within the government sector, a major employer is the Wyoming State Hospital in Evanston. This hospital is the only permanent care, state-supported mental hospital in Wyoming.

OUTLOOK

Future growth and development of Uinta County will depend to large extent on the magnitude of mineral and energy-related developments in southwestern Wyoming. To date, natural gas production has played a significant role in Uinta County, and is expected to expand even further. Oil production is also a growing concern and the significance of coal production and development is predicted to expand as well, as technology in this field advances.

Due to the growing energy industry, population, housing demands, school enrollment, and personal income are also expected to grow at a rapid pace.

Key to Units Code

01	THOUSAND BOARD FEET
02	PERCENTAGE
03	NUMBER OF INDIVIDUALS
04	THOUSAND KILOWATT HOURS
05	DOLLARS
06	MILLIONS OF DOLLARS
07	BILLIONS OF DOLLARS
08	THOUSANDS OF DOLLARS
09	NUMBER OF HOUSEHOLDS
10	HUNDREDS OF DOLLARS
11	SHORT TONS
12	THOUSAND SHORT TONS
13	MILLION CUBIC FEET PER DAY
14	THOUSAND BARRELS PER DAY
15	INDIVIDUAL VISITORS
16	GALLONS
17	AVERAGE DAILY NUMBER OF VEHICLES
18	MILLION MILES
19	FATALITIES PER MILLION MILES
20	THOUSAND CUBIC FEET
21	KILOWATT HOURS
22	THOUSANDS OF GALLONS
23	VISITOR DAYS USE
24	NUMBER OF INDIVIDUAL CRIMES REPORTED
25	HUNDREDS OF THOUSANDS OF DOLLARS
26	HUNDREDS OF BARRELS
27	HUNDREDS OF MCF
28	$ PER TON
29	$ PER MCF
30	$ PER BARREL
31	VEHICLES

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Format

For data available at least quarterly, the last 12 quarters are printed in WQU. In this edition, published series begin with the 2nd quarter of 1979, and end with the 1st quarter of 1982. For other data series (primarily annual), the most recent observations, up to 12, are published in WQU. Most annual data series will reappear in WQU only when updated, or about every fourth issue. Quarters are calendar quarters. For example, the 3rd quarter is composed of July, August, and September. In the table headings and narratives, a particular quarter will be indicated by notation such as 2/80 (2nd quarter, 1980), 1/80 (1st quarter, 1980), and so on.

Beside each data series name is a two-digit number in parentheses. The number is a data value units (such as dollars, tons, feet, miles, etc.) code. The key to the units code follows the last county profile page. Following the units code page is a bibliography of data sources, listed by WQU page number of the data.

Throughout WQU, all data are for the state unless otherwise stated. The most recent year's data should be viewed as preliminary, due to revisions. The acronymn "INA" signifies that information is not available. Some graphics are used to illustrate trends. When more than one trend line appears on a graph, the line will be labeled with a number which matches the number of a data series on the accompanying table.

The reader should be attentive to the footnotes at the bottom of pages, particularly those accompanying a data table. The footnotes help the reader to properly interpret the data, and they also indicate when more detailed (by subject or by area) data than that which is shown is available from IPR.